



***KNOXPLANS* USER GUIDE**

September 2014

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Project Document Control

The following information is used for document control and maintains a history of document changes for this document.

Date	Version	Author	Group	History
September 2014	8	Mary Alarcon	Information Systems	Updated Appendix B – New Users Instructions
September 2014	7	Mary Alarcon	Information Systems	Revised due to changes in the workflow due to version 8 upgrade
October 2012	6	Mary Alarcon	Information Systems	Revised New User instructions at end of manual pertaining to system requirements (regarding Windows 7 and Internet Explorer 9).
November 2011	5	Mary Alarcon	Information Systems	Revised New User instructions at end of manual pertaining to system requirements
February 2011	4	Mary Alarcon	Information Systems	Revised to add note about adding Knoxplans.org to Trusted Site list in Internet Explorer
August 2010	3	Mary Alarcon	Information Systems	Revised to include troubleshooting tip about Windows Vista setting and install of Brava ActiveX controls.
August 2010	2	Mary Alarcon	Information Systems	Re-Issued to include New Users Instructions at end of Manual
January 2010	1	Mary Alarcon	Information Systems	Original Version

This document is created and distributed by the City of Knoxville - Department of Information Systems

Questions or comments pertaining to this document should be addressed to:

Information Systems
215-4481

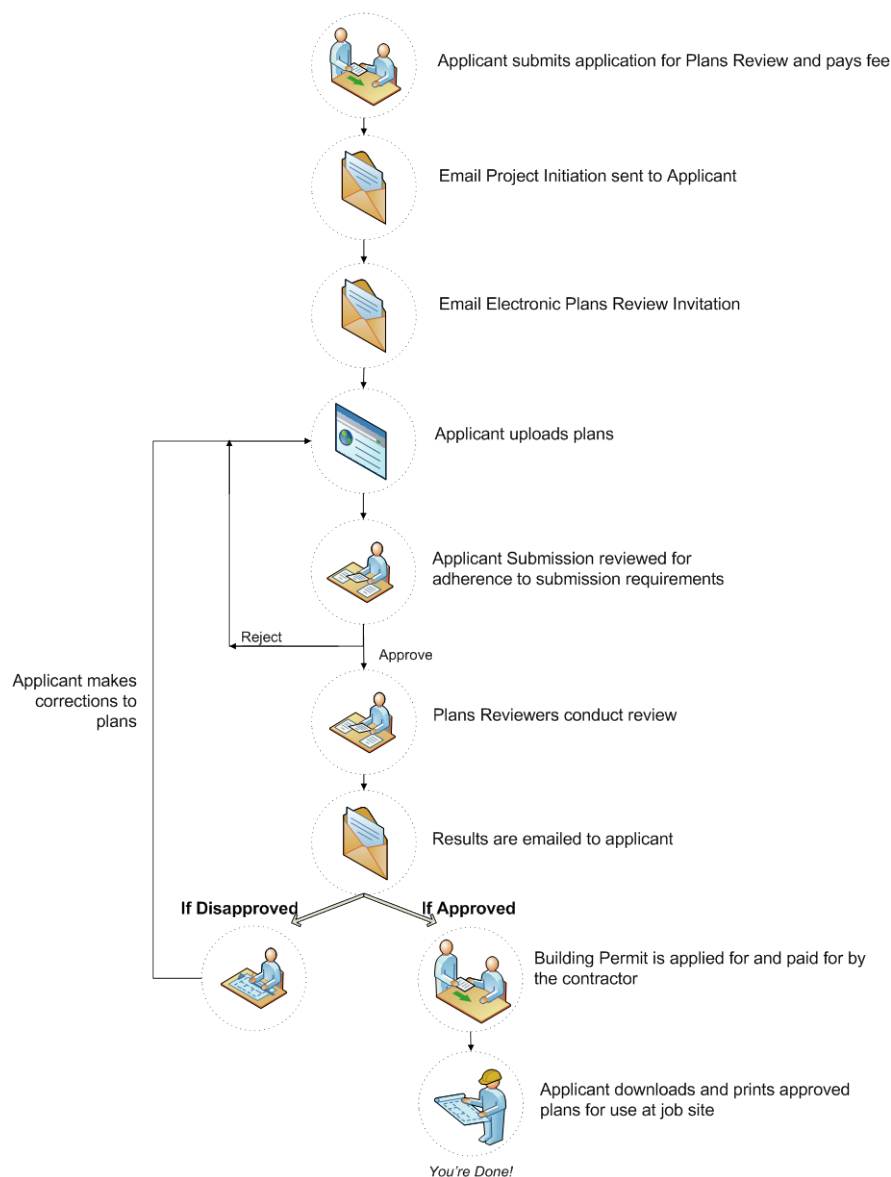
Introduction

KNOXPLANS is the City's innovative process for Plans Review which uses a web-based digital plan submission and review process. Electronic submission of plans is a practice in the construction industry that saves customers hundreds of dollars in printing and storage costs, and results in faster permit processing.

This process allows you to submit online drawings and other plan documents for an online review resulting in a reduction in cost, paper, time, and money. **No more paper copies, wasted gas, parking costs, or trips downtown.**

After plans are uploaded, the City's reviewers will review them online. You will be able to see the review results as soon as they have been made. With this new and more efficient review process, you will see faster results and have more time to make corrections.

KNOXPLANS/ProjectDox Workflow



KnoxPlans Workflow Updates

This manual details a newer updated workflow that Knoxplans will apply to new projects starting in October, 2013. You will be given more information in a letter detailing this new workflow. It is important to remember that this workflow does not replace the current workflow that has been in effect since the beginning of KnoxPlans. Both workflows will be occurring in tandem with each other since there are active projects in the system using the older workflow. The new workflow will be for NEW projects only.

The next page details our updated workflow. You will find this manual on the Knoxplans internet page on the City of Knoxville's website.

Below is a quick way you can look at a project and be able to tell if it is using the new workflow or the older workflow.

A. Open the project in KnoxPlans.

B. The Old Workflow looks like this at the top. There is a button named **Task List**.



C. The New Workflow looks like this at the top. There is a button named **Workflow Portals**.



KNOXPLANS Workflow Summary

Step 1: Apply for Plans Review

- Apply for plans review and pay necessary fees. Inform the City that an online review is to be performed. Provide a valid email address for the contact person.

Step 2: Applicant Receives Project Initiation Email

- Review project initiation email.

Step 3: Applicant Receives Email Invitation to Upload Plans

- Review invitation email inviting applicant to upload plans.

Step 4: Applicant Uploads Drawings/Plans

- Login to ProjectDox as indicated in the invitation email. Upload drawings and related documents.

Step 5: Review/ Pre-Screen

- The Review Coordinator at the City of Knoxville will Pre-Screen the submission for adherence to Submission Standards.
- Refer to Plan Submission Standards (pgs. 52 & 53)

Step 6: Reviewers perform Online Review

- City reviewers perform online review. Applicant can view real-time results.

Step 7: Applicant notified of review results. If Disapproved, applicant invited to re-submit corrected plans.

- Check email for plans review approval status. If approved, skip to step #11. If disapproved, you will receive a “Resubmit Request” email. Continue to next step to re-submit corrected plans. Login to ProjectDox and review the Conditions report and comments from Reviewers.

Step 8: Applicant Uploads Corrected Plans

- Make necessary corrections to drawings and upload corrected plans using same file name. When ready for review, resubmit request by clicking the “Resubmit Drawings” button on the “Resubmit Request” form.

Step 9: Reviewers perform Additional Reviews

- City reviewers perform online review of corrected plans.

Step 10: Applicant receives Approval Email

- Check email for plans review approval status. If approved, skip to last step. If disapproved, go back to step #8 to re-submit corrected plans.

Step 11: Applicant downloads approved plans

- Contractor applies and pays for a building permit. Login to ProjectDox and download plans. Print a copy of approved plans for use at job site.

Step 1: Apply for Plans Review

Before Starting...

- Review the list of system requirements and make sure that you meet them. They are listed on the city's website and on page 52 of this user manual.
- Make sure you've installed the ProjectDox components on your pc. Information on how to do this can be found in "Knoxplans for New Users" which is at the end of this manual. Make sure you've added your Security Question as the instructions indicate.

Plans Review Application

Apply for the Plans Review with the City's Plans Review Office either in person, by emailing, or by faxing the application. The plans review application can be downloaded from the City's website and printed.

Fees

Pay your fees during the application process. You can pay in person or over the phone using a credit card or your trust account.

Notification & Email

Inform the staff you want to submit plans for an online review. Provide a valid email address which will be the main point of contact between the City and the Project. So make sure it is the best one for the job. Although this email is the main contact, you can add others later to the project. If the main email contact changes during the project, you must inform the City of a replacement email for the new main contact.

- ❗ It is important that this email contact remain current so that project communications can continue.

Things to Remember

- Keep email contacts current for each project. If a resource leaves during a review, the project communication needs to be re-routed so that information keeps flowing.

What Next?

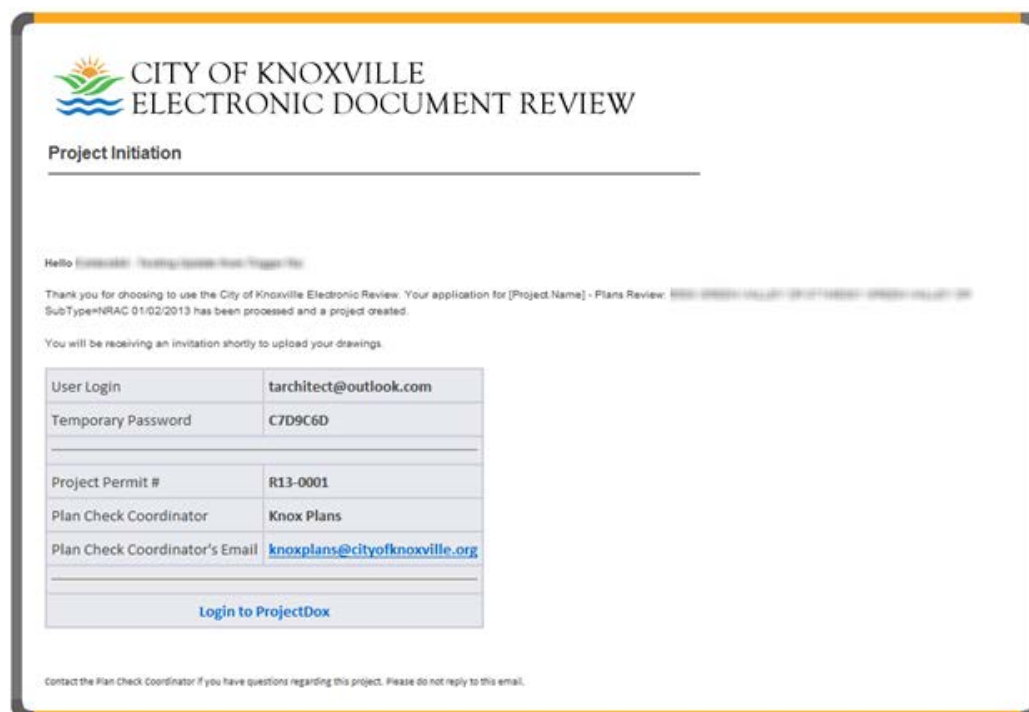
Check your email for an invitation to join the project. → *Step 2.*

Step 2: Applicant Receives Project Initiation Email

Once the City receives your Plans Review application, the project will be setup in our system (ProjectDox). You will receive a Project Initiation email (see example below).

- ❗ If this is your first contact with ProjectDox, your invitation will also contain a temporary password

Example of Actual Email



How to Login:

1. Click the **Login to ProjectDox** link at the bottom of the invitation email you received.

- ❗ This email has the user login and temporary password that you will need to login. Future emails will not contain a temporary password.

2. The login window will open. In the E-mail field, type the **User Login** information as listed in your invitation email.
3. In the Password field, type the **temporary password** as listed in the same email. You will be given an opportunity to change it.
4. Click **Login**.



5. This will take you to the *User Profile* screen. (Required fields display with colored highlight.)
6. In the **Change Password** section, enter your new password in the first two fields (**Ref. ❶**, below).
7. In the **Password Reset Question & Answer** section, enter a security question and answer so that your password can be reset if necessary (**Ref. ❷**, below).
8. Enter remaining contact information as applicable on the screen.

9. You can access this screen again at any time by clicking the **Profile** button in the main ProjectDox button bar.
10. Click **Save** when you are finished.

Things to Remember

- Change your password after logging in for the first time with the temporary password.
- Please do not upload your plans until you receive the invitation email to do so.

What Next?

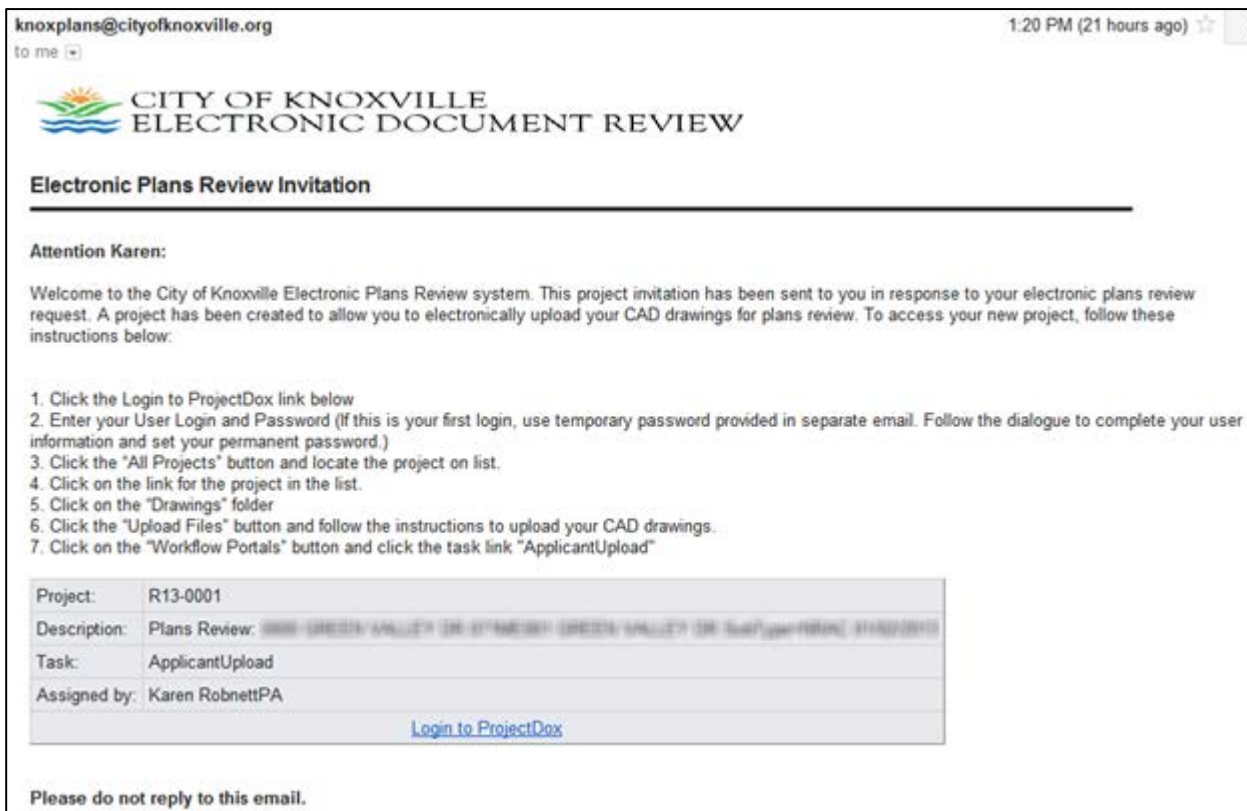
Applicant receives email invitation to upload plans. → *Step 3.*

Step 3: Applicant Receives Email Invitation to Upload Plans

After the initial email, you will then get an email invitation to upload your plans.

You must receive this email before uploading your plans. If you are expecting an invitation email and don't get one, check with the City to make sure the email contact address is correct for your project. Also, check the spam filter settings on your email program to make sure it can accept email from **knoxplans@cityofknoxville.org**.

Example of Email



Things to Remember

- Change your password after logging in for the first time with the temporary password.
- Plan drawings must be submitted in searchable .PDF format only. This means that the file was electronically converted from your drawing program into a **.PDF** file rather than scanned as a .PDF file.

What Next?

Login to system and upload plans for review. → *Step 4*

Step 4: Applicant Uploads Drawings/Plans

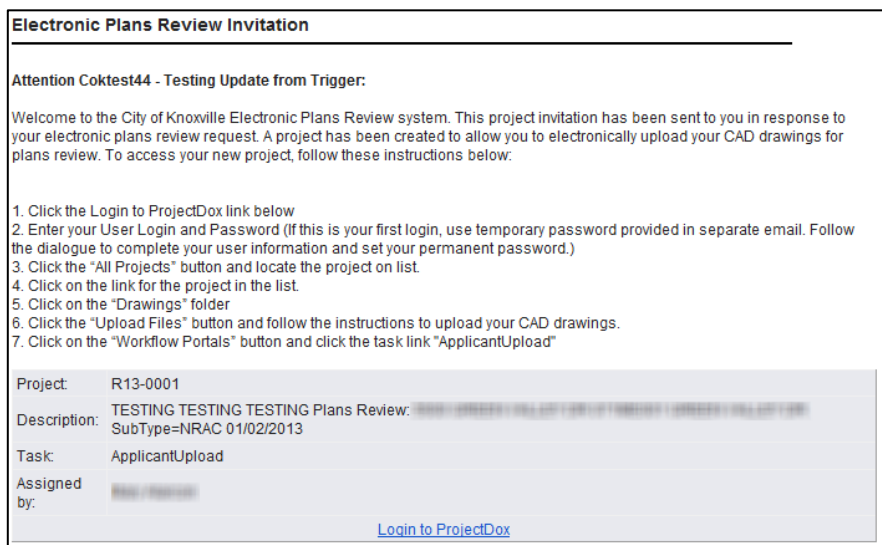
Before Starting...

- Review the City of Knoxville's Plans Review Submission Standards to make sure your drawings meet the necessary requirements. There is a set of standards for Commercial and one for Residential. These can be found in this manual on pages 52 & 53.

To View Project and Upload Drawings:

1. Login by clicking the **Login to ProjectDox** link at the bottom of the invitation email you received. The KNOXPLANS website will open. If this is the first time logging in, please refer to "**KNOXPLANS for New Users.**" This document will be located on the city's website. It is also included at the end of this user manual.

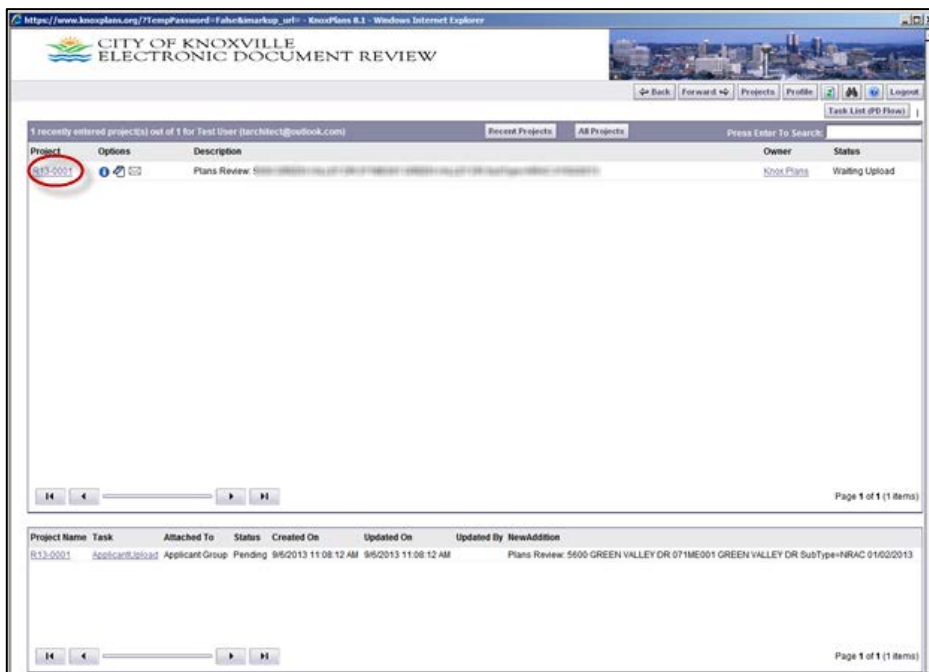
Example of Email



2. On the Login screen, enter the contact email address and password. Click **Login**.



3. Locate the project on the screen and click the project name link at the start of the row.



Project List

There are 2 lists that can be displayed in the Project List area. These are controlled by the following buttons:

Recent Projects button:

This is the default view. Projects that have been opened by you are visible in this list. The most recent project visited is displayed at the top of the list.

All Projects button:

This list displays all projects you have been invited to. If you do not see a project in your list, then click this button.

Workflow Tasks Assigned to User

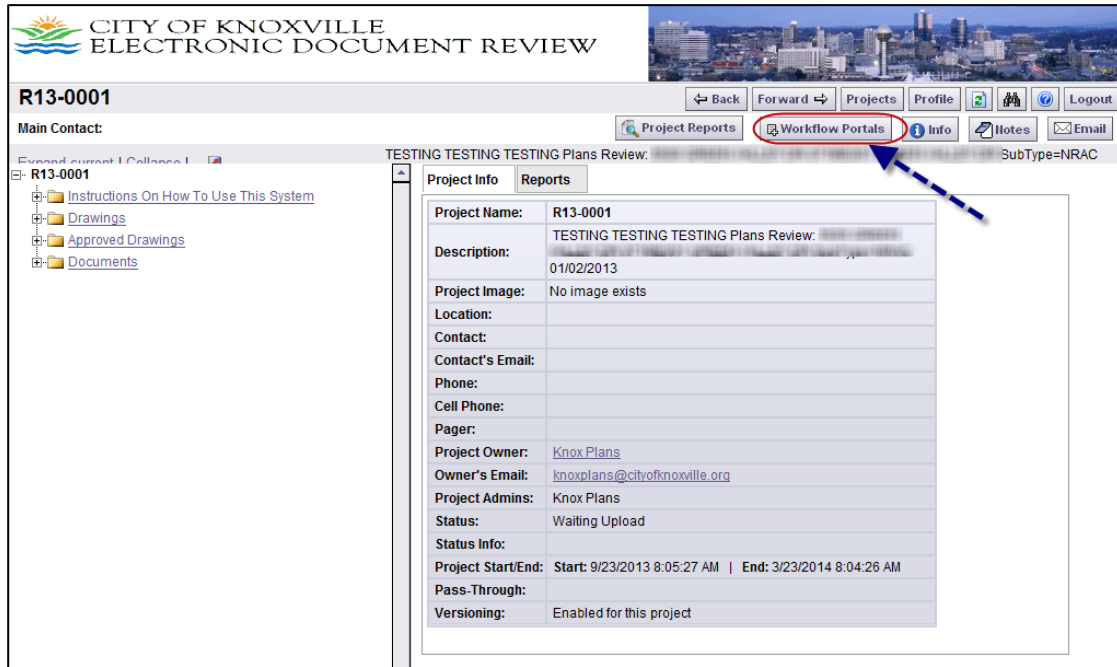
Notice you will also be able to view any workflow tasks assigned to the user at the bottom section of the screen. If your task does not show here, then the workflow has not been started yet.

There are 3 statuses assigned to workflow tasks:

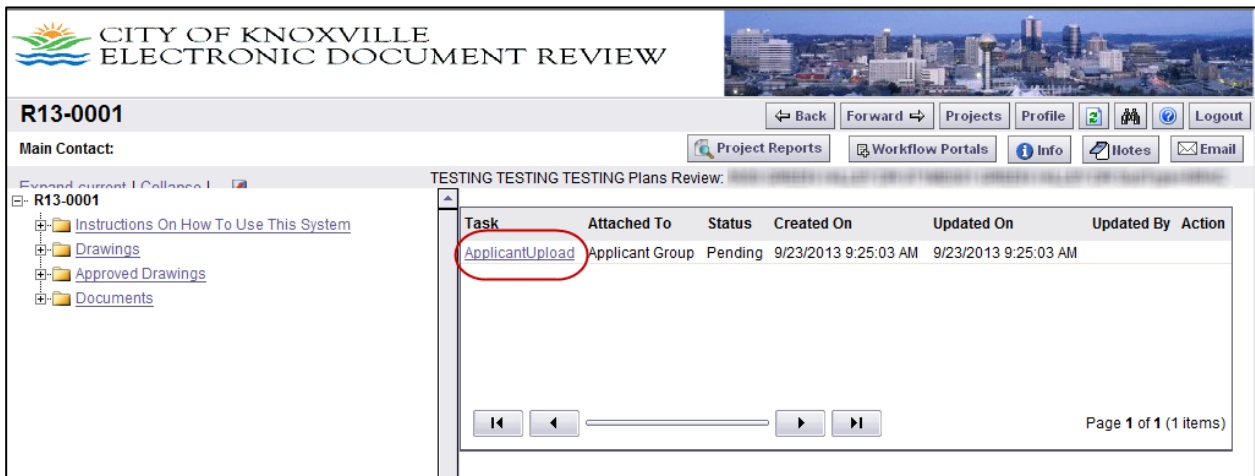
1. Pending
2. Accepted
3. Completed

A workflow task is only displayed when an action is required of the user. If it is completed, the applicant should no longer see the task in their task list.

- The main project screen will open. Click on the **Workflow Portals** button to display the task(s) assigned to the user.



- Click on the **Applicant Upload** task to accept. Click **OK** to accept. The status will change to "Accepted".



6. An eform will open in another window. Close this window for now by clicking the **Save & Close for Later** button.

① You will come back to this eform when you have finished uploading your drawings.

https://www.knoxplans.org/?LaunchMode=frame&FlowTaskID=426 - ProjectDox Plan Review Form - Windows Internet Explorer

CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW

[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information | Resources | Checklist Report (0) | Routing Slip

Review Coordinator: Karen RobnettPA (krobnettpa@gmail.com)

Review Cycle: 1

Workflow/Activity Name: Start_Plan_Review_Workflow_V1 / ApplicantUpload

Activity Instructions: [Empty field]

Current User Logon: Test User (tarchitect@outlook.com)

After you have successfully uploaded all required plans/documents please click (Upload Complete - Notify City) button. This must be completed for Pre-Screen review to begin.

Upload Complete - Notify City | Save & Close for Later

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7. Now you are ready to upload your drawings. Click on the **Drawings** folder.

https://www.knoxplans.org/?ProjectID=1286 - KnoxPlans 8.1 - Windows Internet Explorer

CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW

R13-0001

Main Contact: Coktest44 - Testing Update from Trigger

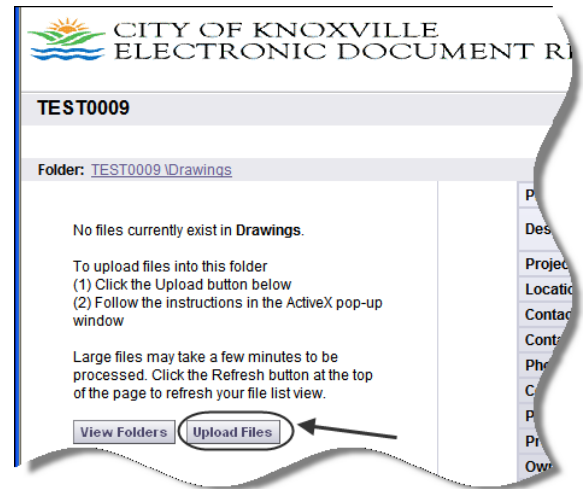
Expand Content | Collapse |

Plans Review:

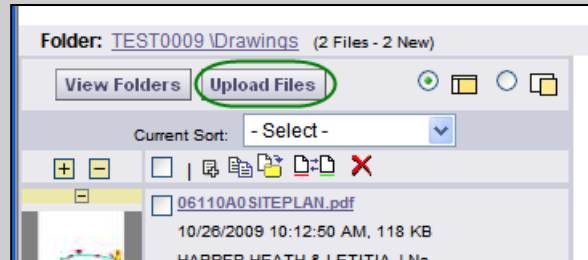
Task	Attached To	Status	Created On	Updated On
ApplicantUpload	Applicant Group	Accepted	9/5/2013 11:08:12 AM	9/6/2013 12:48:18 PM

Navigation buttons: [Previous], [Next], [First], [Last]

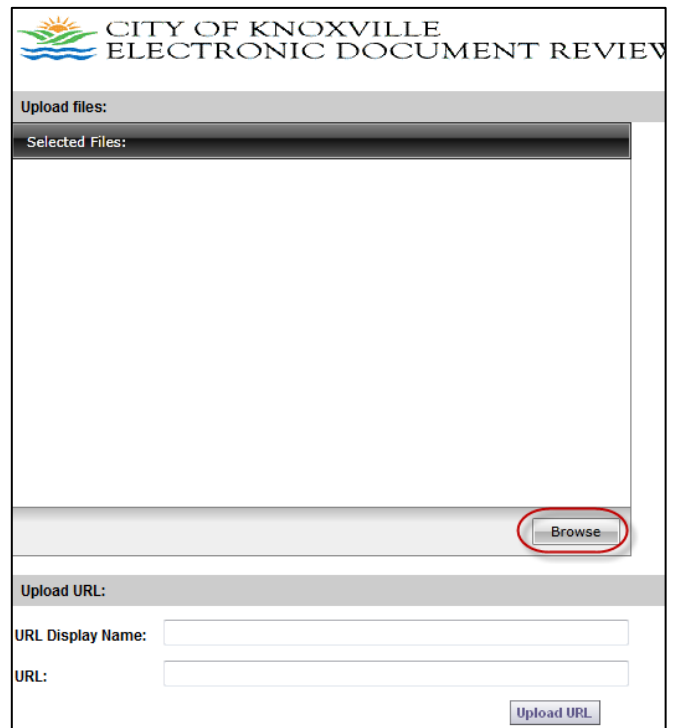
8. Click **Upload Files**.



❗ If uploading additional files to your project after the first time, the **Upload Files** button will be near the top of the screen above the drawings that have already been uploaded.

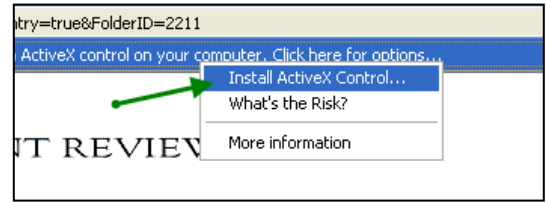


9. Click **Browse** button to locate the files on your computer.



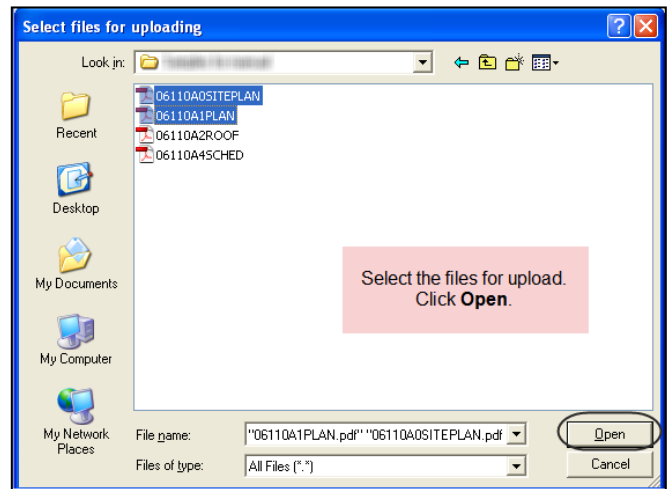
10. If prompted to download an ActiveX component, follow screen instructions to install the necessary components.

i Make sure your pop-up blocker has been disabled.



11. When the component has finished installing, you will be asked to select files for uploading. Navigate to the location of your drawings and any other project files. Click on the files to upload. To select multiple files, press and hold down **Ctrl** key as you click each drawing filename.

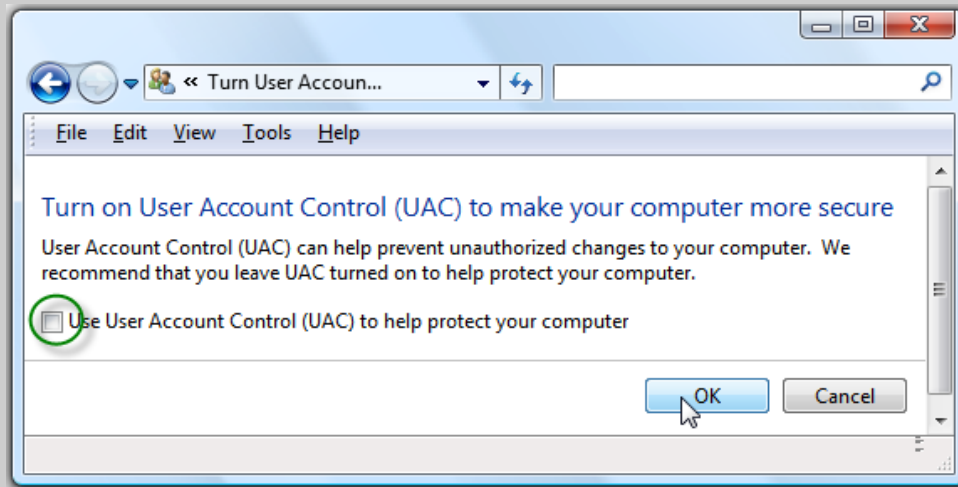
i **Note:** If resubmitting drawings, each drawing must retain the same name used at the time of the initial upload. A version number will be applied to these drawings.



12. When finished selecting files, click **Open**.

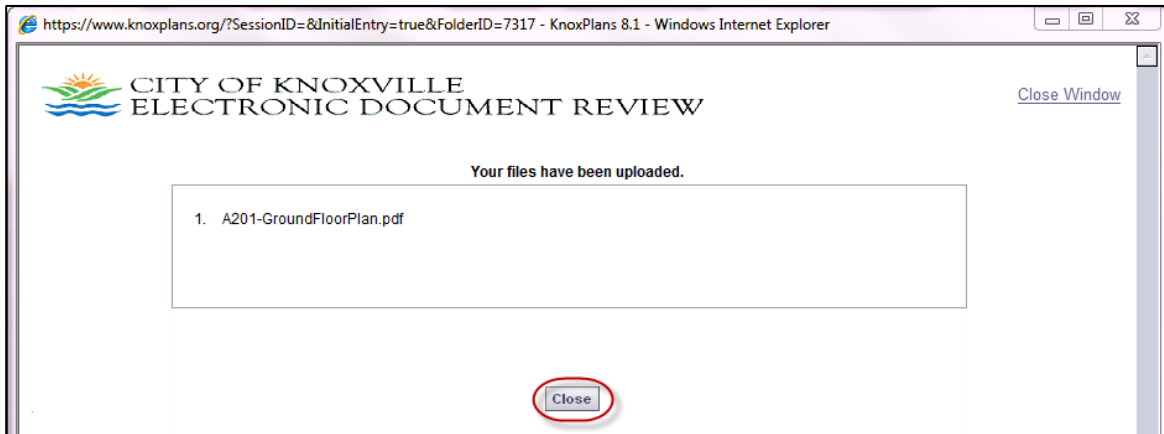
TROUBLESHOOTING TIP: If you are unable to view drawings and did not receive a prompt to install the Brava ActiveX controls after the re-install of Brava numerous times:

Check to see if you are running a Vista operating system with **User Access Controls** (UAC) turned on. If so, this will prevent the Brava components from loading on your PC. Turn off UAC on Vista (this is done by going to **Control Panel > User Accounts > Turn Account Control On or Off**). Remove the checkmark to disable UAC and click **OK**. Re-boot machine and install the Brava components again.

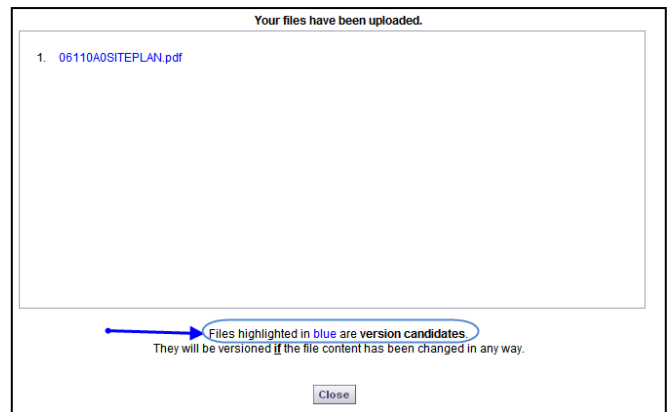


13. The files will be displayed on the screen.
Click **Upload** button.

14. You will see a message indicating that your files were successfully uploaded. Click **Close** on this screen.

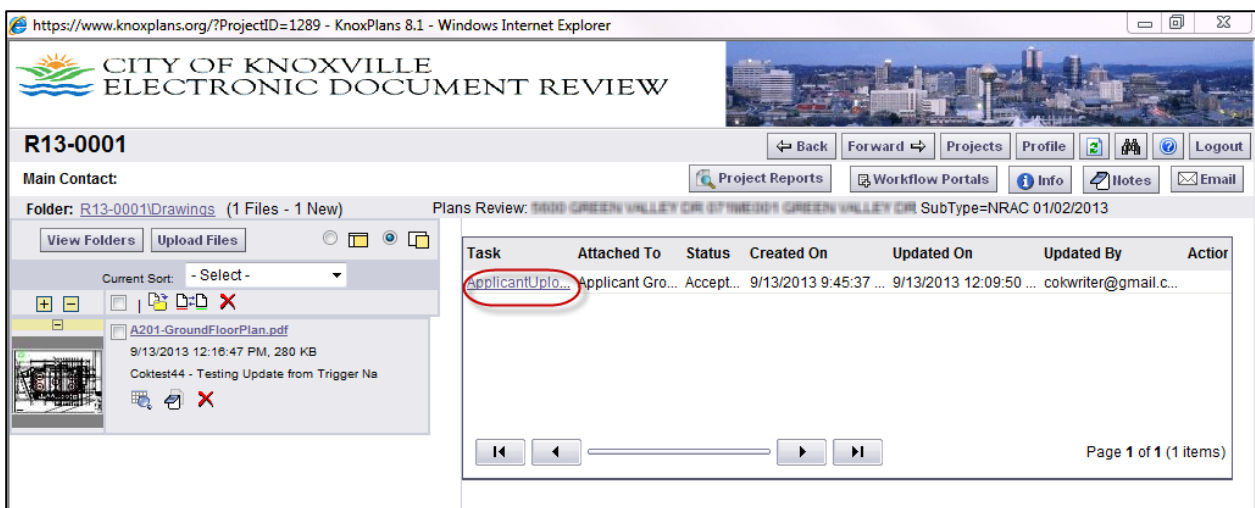


- ❗ If uploading a new version of an existing document, this will also be noted on this screen.



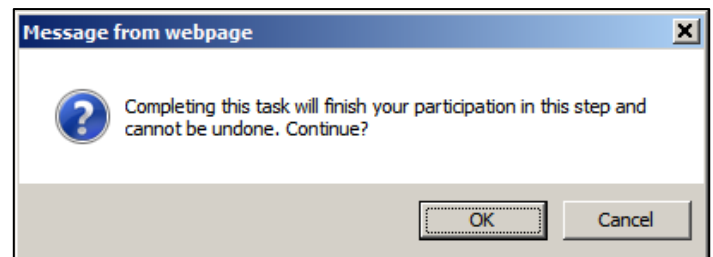
15. Repeat these steps to upload your remaining drawings and plans.

16. Once again, click the **Applicant Upload** task.



17. The same e-form as before will open. If you have finished uploading your drawings, click the **Upload Complete – Notify City** button.

18. A popup message will open. Click **OK**, only if you are ready for review.



19. The main Project screen will return. Notice that the applicant no longer has a task for this project. The project will have a status of **Applied**.



Things to Remember

- Drawings can be uploaded at multiple times and even replaced or deleted while you are getting ready for the review to start. Only indicate "**Upload Complete - Notify City**" when you're finished uploading your files.
- Other project documents should be uploaded into the **Documents** folder for the project. Schedules and specifications should be submitted as multiple-page document files.
- If you need to send communication to the City or to the plans reviewers, use the Notes feature to send notes that will be permanently attached to the project. See **Topics and Notes** in this manual (pg 48) to learn how to add a note. You can also use TeamMail to send email to project members.

What Next?


Your plans have been submitted for review. A prescreen review will occur to ensure that you meet the submission requirements. If your prescreen review is approved, continue to **Step 6**. If rejected, continue to **Step 5**.

Step 5: Review / Prescreen

The City will review your submitted project materials to make sure all necessary documents and drawings have been included. If not, you will be notified as to which corrections are needed before the review can start.

If the plans submission fails the Review Prescreen, a **CorrectionComplete** task will be added to the project for the applicant. The applicant will also get an email to that effect (see sample below).

Sample Email if Corrections are Required During Prescreen Review


**CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW**

Pre-Screen Correction Request Task Assignment

Attention Coktest44 - Testing Update from Trigger:

Your plan review submission for Project: **R13-0001** has not met the minimum requirements for acceptance. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Project:	R13-0001
Description:	TESTING TESTING TESTING Plans Review: [REDACTED] SubType=NRAC 01/02/2013
Task:	CorrectionComplete
Assigned by:	[REDACTED]


[Login to ProjectDox](#)


1. Login to Knoxplans and select your project. Click the **Workflow Portals** button.
2. Click on the **Correction Complete** task link to accept this task. Click **OK** to confirm.



3. An eform will open. Review the comments on the eform. These comments will tell you what you need to fix before re-uploading your plans.

https://www.knoxplans.org/?LaunchMode=frame&FlowTaskID=428 - ProjectDox Plan Review Form - Windows Internet Explorer

 CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW

 [Click Here to Save Eform as PDF...](#)

Review Information | **Permit Information** | **Resources** | **Checklist Report (0)** | **Routing Slip**

Review Coordinator	Karen RobnettPA (krobnnettpa@gmail.com)
Review Cycle	1
Workflow/Activity Name	Start_Plan_Review_Workflow_V1 / CorrectionComplete
Activity Instructions	Please review the Permit Clerks notes and submit the required drawings and documents.
Current User Logon	Test User (tarchitect@outlook.com)

Task Instructions

[VIEW INTAKE CHECKLIST \(0\)](#)

☐ I have uploaded the corrected documents and/or drawings as indicated below.

Thank you for providing a cover sheet. Could you also include on this cover sheet the Occupancy Class? Thank you.

Corrections Complete | **Save And Close**

4. Click the **Save and Close** button to close this window.
5. Make the necessary corrections to your plans and re-upload them to the project using instructions provided in Step 4.
6. Follow steps 1-2 to re-open the **CorrectionComplete** task.

7. The eform will open again. This time, you will complete the eform. At the bottom of the screen, check the “I have uploaded the corrected documents and/or drawings as indicated below” check box. (Ref. ❶, below)

**CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW**

[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information | Resources | Checklist Report (0) | Routing Slip

Review Coordinator: Mary Alarcon (malarcon@cityofknoxville.org)
 Review Cycle: 1
 Workflow/Activity Name: Start_Plan_Review_Workflow_V1 / CorrectionComplete
 Activity Instructions: Please review the Permit Clerks notes and submit the required drawings and documents.
 Current User Logon: Coktest44 - Testing Update from Trigger Na (cokwriter@gmail.com)

Task Instructions

❶ [VIEW INTAKE CHECKLIST \(0\)](#)

☒ I have uploaded the corrected documents and/or drawings as indicated below.

❷ **Corrections Complete** | Save And Close

Best in Class Version 1.0

8. Click the **Corrections Complete** button (Ref. ❷, above) and confirm that the task should be completed by clicking **OK** on the message.
9. The task will no longer be assigned to the applicant.

What Next?

Your plans have been submitted for review and will again be subject to a prescreen review. If this review is successful, the City's reviewers will be invited to review your project. → *Step 6*

Step 6: Reviewers Perform Online Review

When the project file is complete and has been accepted, the City's plans reviewers will be invited to review the project online.

While the project is in review, you can view the project status by viewing the Projects screen. You can also view the reviews and any markups that have been made. No files can be submitted during the review phase of the process.

To Review Project Status during Review:

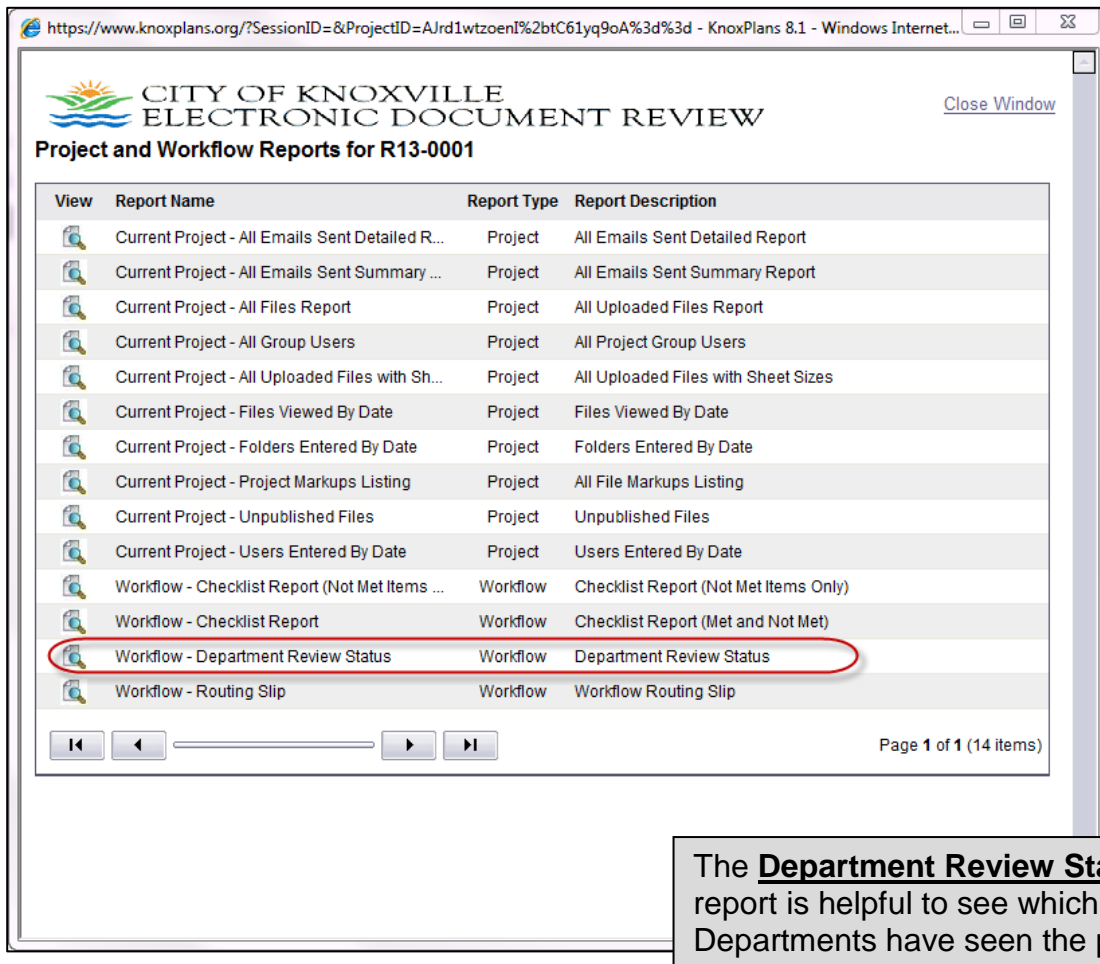
1. Go to www.Knoxplans.org website and login to ProjectDox using your email address and password.
2. The Projects screen will open (as shown below). If your project has been accepted, the status will be **Open** (Ref. ❶, below) and the review has started. If the status is "[None]", then the review has not started yet.
3. At any time during the process, you can login and view the review status. To see the list of individual reviews and their status, click on the name of the project (Ref. ❷, below).



4. Next, click **Project Reports**.



5. Click the magnifying glass icon to the left of the desired report to see the report.



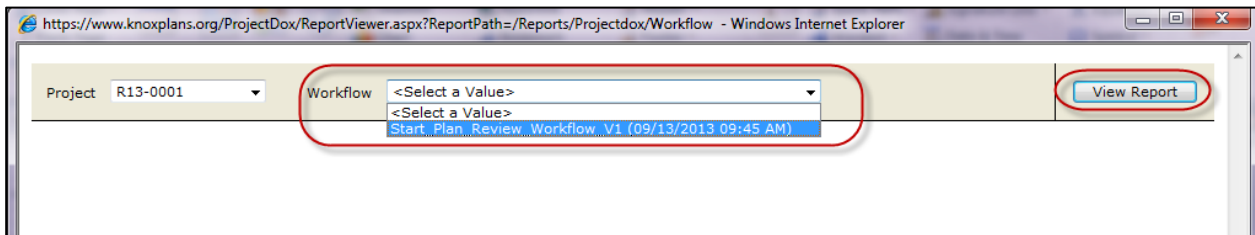
The screenshot shows the 'CITY OF KNOXVILLE ELECTRONIC DOCUMENT REVIEW' interface. The title is 'Project and Workflow Reports for R13-0001'. Below the title is a table with the following columns: View, Report Name, Report Type, and Report Description. The table lists 14 reports. The report 'Workflow - Department Review Status' is highlighted with a red circle. Below the table are navigation buttons and a page indicator 'Page 1 of 1 (14 items)'.

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed R...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary ...	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sh...	Project	All Uploaded Files with Sheet Sizes
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	Workflow - Checklist Report (Not Met Items ...	Workflow	Checklist Report (Not Met Items Only)
	Workflow - Checklist Report	Workflow	Checklist Report (Met and Not Met)
	Workflow - Department Review Status	Workflow	Department Review Status
	Workflow - Routing Slip	Workflow	Workflow Routing Slip

Page 1 of 1 (14 items)

The **Department Review Status** report is helpful to see which Departments have seen the project

6. Select the most recent workflow from the workflow pull-down list, and then click the **View Report** button.



The screenshot shows the 'ProjectDox/ReportViewer.aspx' interface. The 'Project' dropdown is set to 'R13-0001'. The 'Workflow' dropdown is open, showing a list of workflows. The 'View Report' button is highlighted with a red circle.

Project: R13-0001

Workflow: <Select a Value>
 <Select a Value>
 Start Plan Review Workflow_V1 (09/13/2013 09:45 AM)

View Report

7. The report will then display on the screen.
 - o *Current Project - Project Markups Listing, Workflow - Department Review Status, and Workflow - Routing Slip* may be useful reports to view at this point. Details on these reports can be found **page 27**.

What Next?

Wait for the email from the City letting you know of the plans review approval status. If your review was disapproved, read the next step for instructions on how to view markups for your drawings that need revisions. → *Step 7*

Things to Remember

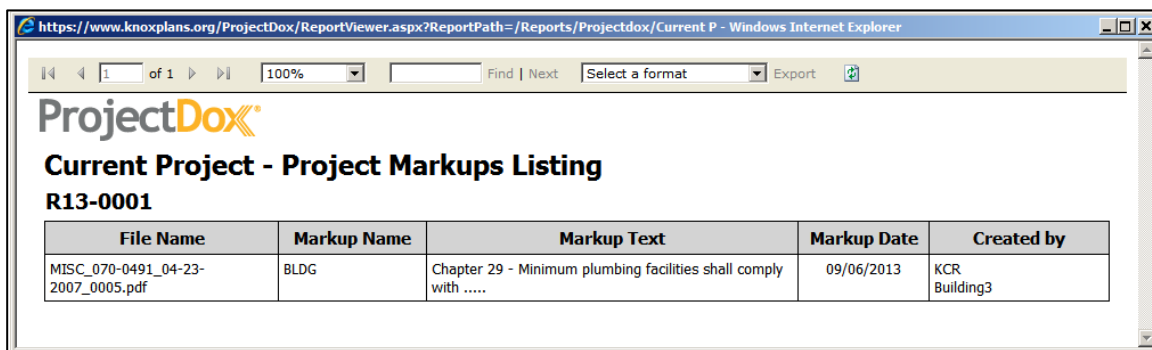
- Although your review is “in progress”, you cannot upload or re-submit drawings until the review is complete.

Useful Reports

The reports that may be useful to an applicant include:

1) Current Project – Project Markups Listing

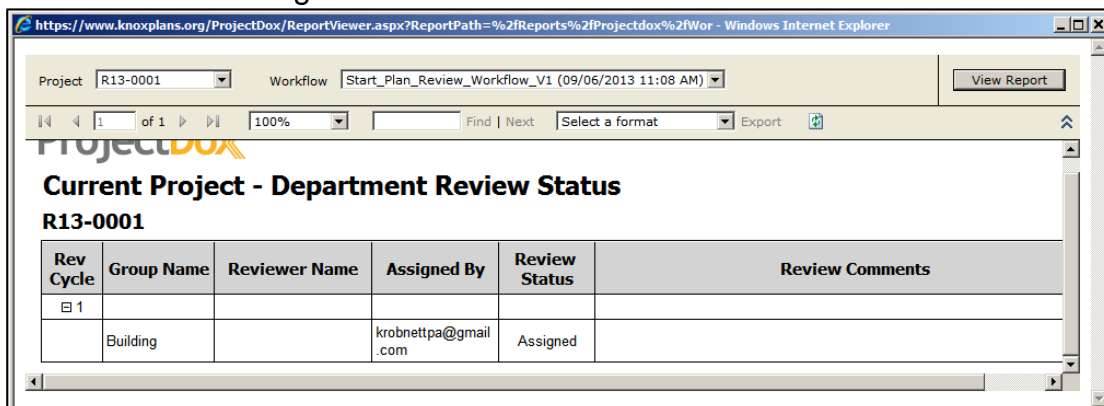
Shows the comments entered on drawings.



File Name	Markup Name	Markup Text	Markup Date	Created by
MISC_070-0491_04-23-2007_0005.pdf	BLDG	Chapter 29 - Minimum plumbing facilities shall comply with	09/06/2013	KCR Building3

2) Workflow – Department Review Status

This is useful for seeing the status of a review.



Rev Cycle	Group Name	Reviewer Name	Assigned By	Review Status	Review Comments
1	Building		krobnnettpa@gmail.com	Assigned	

3) Workflow – Routing Slip

This is useful for seeing the workflow steps that have been started/completed.

https://www.knoxplans.org/ProjectDox/ReportViewer.aspx?ReportPath=%2fReports%2fProjectdox%2fWor - Windows Internet Explorer

Project: R13-0001 Workflow: Start_Plan_Review_Workflow_V1 (09/06/2013 11:08 AM) View Report

1 of 1 100% Find | Next Select a format Export

ProjectDox

Current Project - Workflow Routing Slip

R13-0001

Task Name	Status	Created	Updated	Group	User	Cycle	Completed			
							Date	Days	Hours	Min
ApplicantUpload	Complete	9/6/2013 11:08:12 AM	9/6/2013 1:04:38 PM	Applicant Group	Test User	0	9/6/2013 1:04:38 PM	0	1	56
PreScreenReview	Complete	9/6/2013 1:04:38 PM	9/6/2013 1:30:41 PM	Review Coordinator	Karen RobnettPA	0	9/6/2013 1:30:41 PM	0	0	26
CorrectionComplete	Complete	9/6/2013 1:30:41 PM	9/6/2013 2:01:41 PM	Applicant Group	Test User	0	9/6/2013 2:01:41 PM	0	0	31
PreScreenReview	Complete	9/6/2013 2:01:40 PM	9/6/2013 2:02:26 PM	Review Coordinator	Karen RobnettPA	0	9/6/2013 2:02:26 PM	0	0	0
BeginReview	Complete	9/6/2013 2:02:26 PM	9/6/2013 2:02:46 PM	Review Coordinator	Karen RobnettPA	1	9/6/2013 2:02:46 PM	0	0	0
DepartmentReview	Pending	9/6/2013 2:02:46 PM	9/6/2013 2:02:46 PM	Building		1		0	0	0

Step 7: Applicant notified of review results. If Disapproved, applicant invited to re-submit corrected plans.

When the review is complete, an email will be sent to inform you of the results.

If Approved

You will get an email similar to this example. You are finished for now and can skip to the last step which is where you will download your approved plans after your building permit has been applied for and paid for. You will only get this email when your review is complete and approved. This applies when it gets approved in the first round of reviews or even after multiple rounds of reviews. You do not have to click on anything in the email.




① **Note:** Be sure to print all spec sheets, supporting documents, and conditions for the job site.

If Disapproved

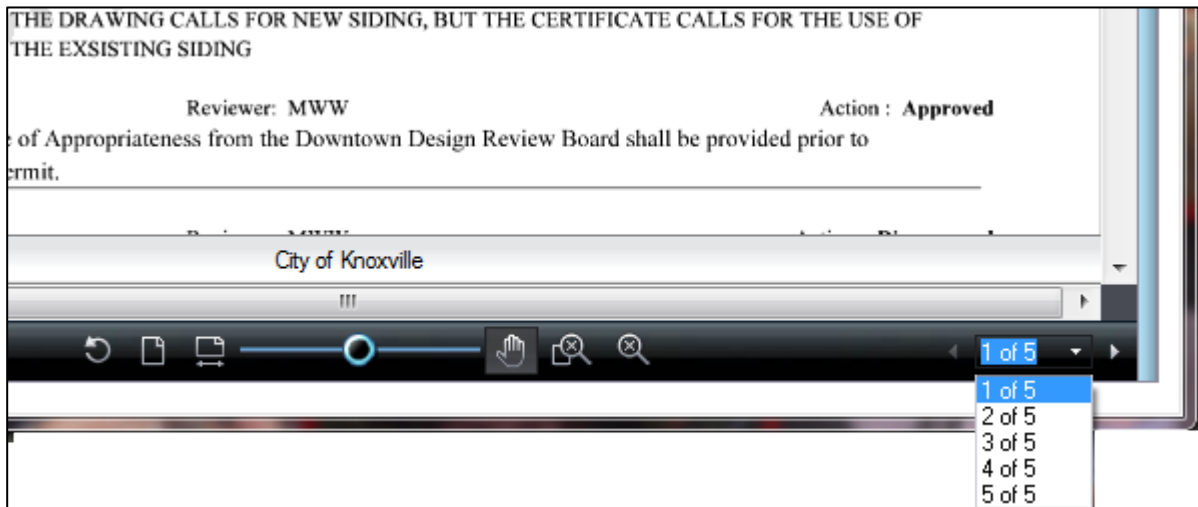
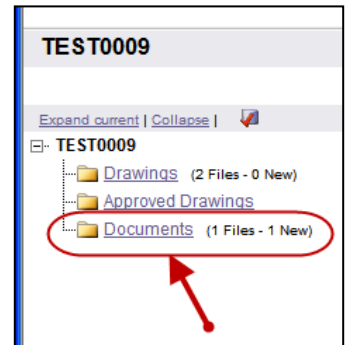
You will get an email similar to this example asking you to correct and re-submit your plans for review. This email is generated by the ProjectDox system when your initial review is complete. Upon receipt of this email, login to www.knoxplans.org and select the project and review violations. There are three ways to view violations:

1. Conditions Report,
2. Markups from individual reviewers on your submitted drawings, and
3. Run the **Current Project – Project Markups Listing** Report. See *pg 25, steps 4-7* for instructions on running project reports.

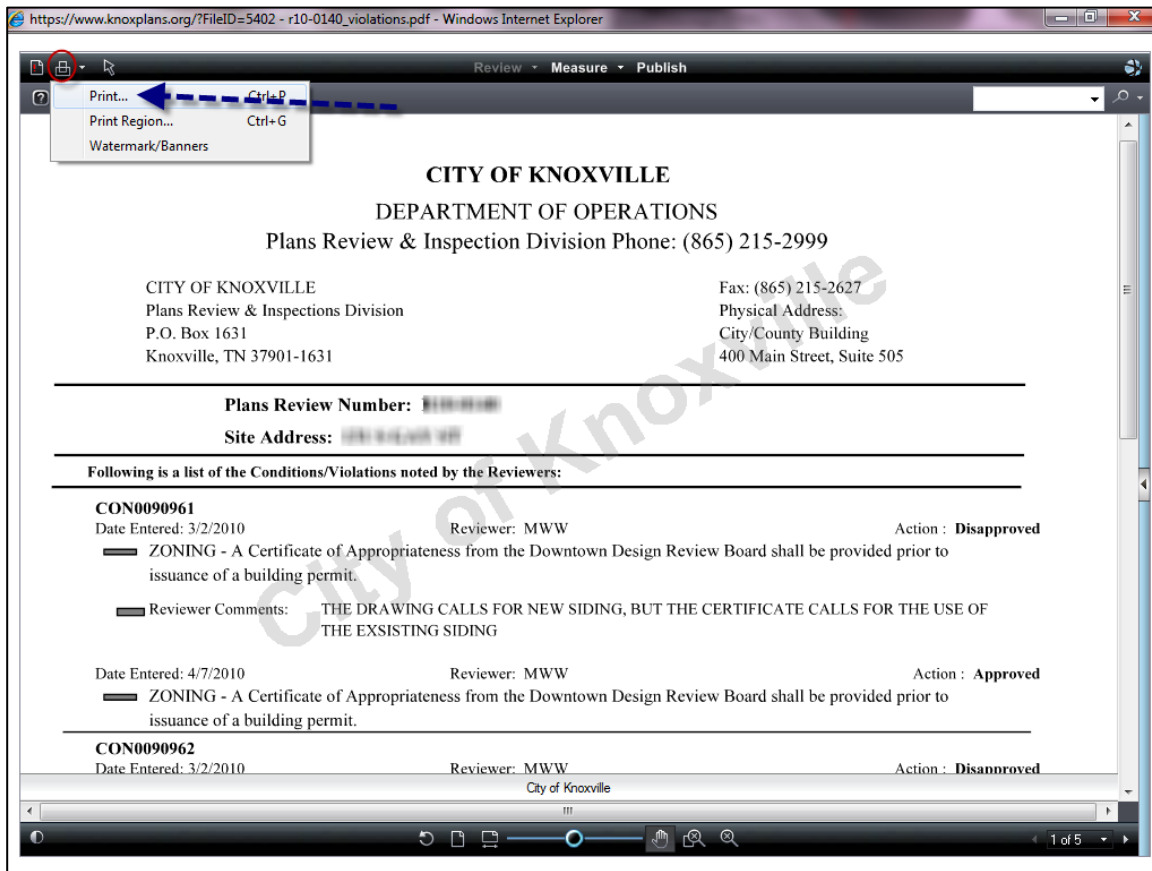
 CITY OF KNOXVILLE ELECTRONIC DOCUMENT REVIEW	
Review Correction Request Task Assignment	
Attention Karen:	
Your plan review submission for Project: R13-0002 has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.	
When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.	
Please be advised when re-submitting plans and/or documents:	
<ul style="list-style-type: none">• All corrections must be uploaded using the same file names as the original submittal• Once corrections have been uploaded for review, no additional submissions will be accepted unless requested	
Project:	R13-0002
Description:	I [REDACTED]
Task:	ApplicantResubmit
Assigned by:	[REDACTED]
Login to ProjectDox	
If you do not have access to the specified folder, please contact the Project Administrator .	
Please do not reply to this email.	

How to View Conditions Report of Violations?

- i** Violations noted on the Conditions Report can be viewed on a drawing by looking at the changemarks.
1. Go to www.Knoxplans.org website and login to ProjectDox using your email address and password.
 2. Select your project by clicking on the Project Name link.
 3. Locate the folders section at the left. Click on the **Documents** folder.
 4. There will be a PDF file in the Documents folder containing your Conditions report (usually named **Rxx-xxxx_violations.pdf** where **xx-xxx** is name of project). The Conditions report is a list of special conditions and violations concerning your plans. Click on the filename to open the report.
 5. The report will open in a new window. You can move to a different page by clicking on the arrow at bottom of screen and selecting another page.



6. The report can be printed by clicking on the printer icon and selecting **Print**. Select a page range or "All" and then click **Print** to continue.

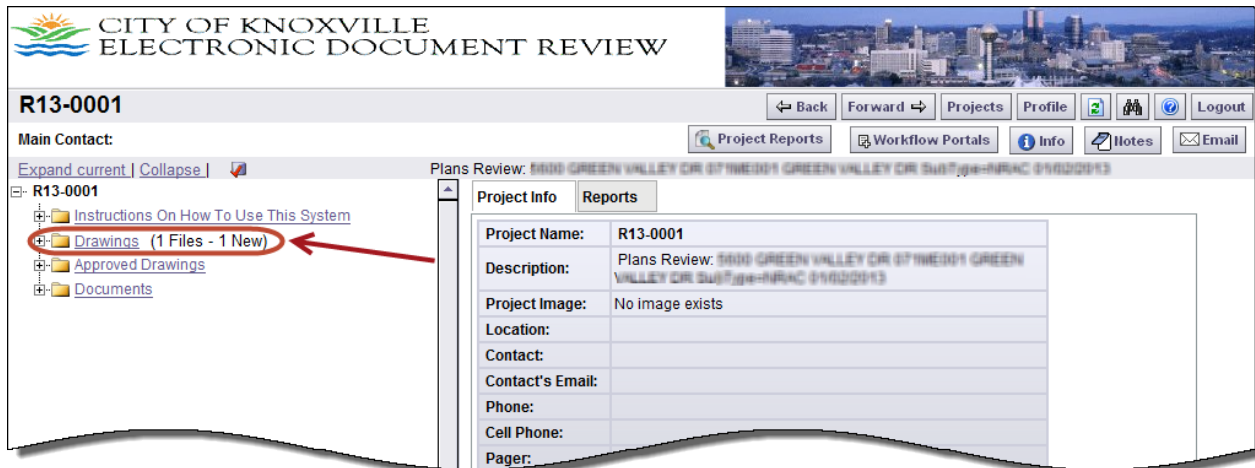



7. Press the red "X" at the top right of the screen to close the report.

To Read Markups and Comments about Violations:

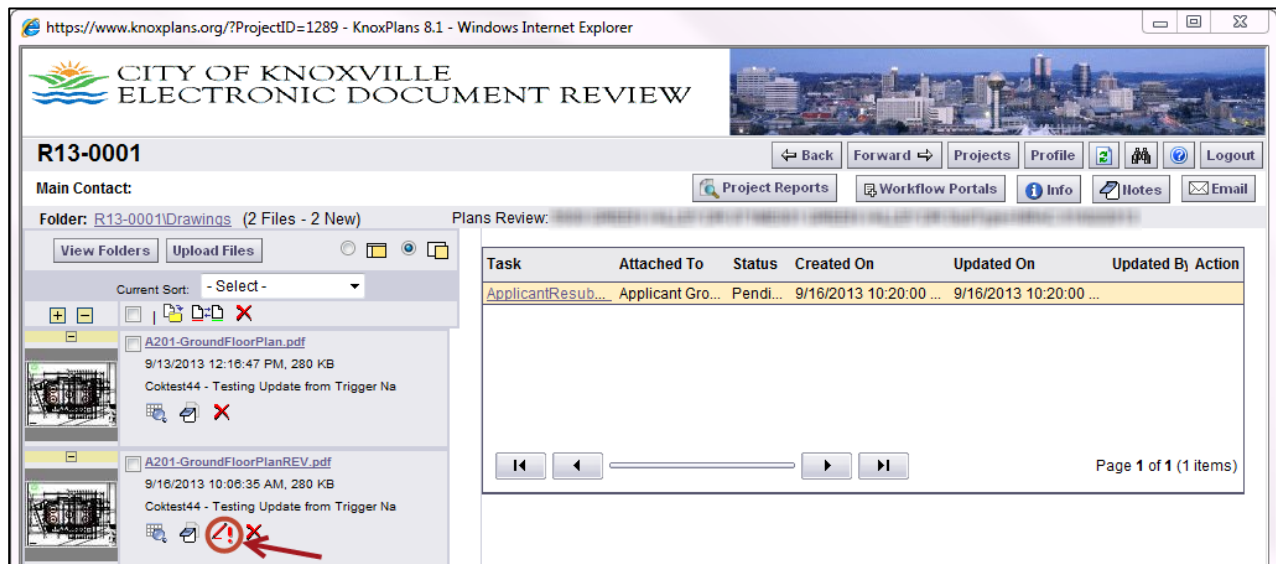
i Markups will show where on the drawing that the violation occurred. There are two methods to view the list of Markups which are described below. To open the drawing and look at the markups, continue with step #1. If the drawing is already open, skip to step #6.

1. From the Projects screen, select your project by clicking on the project name.
2. Click on the **Drawings** folder (at the left) to view the list of drawings.





3. Once the drawing list is displayed, locate the drawings that have markups. They are designated by this pencil icon: . Click on this icon to view the list of markups available for the specified drawing (**1st way to view list**).

i To simply open the drawing, click on the file name next to the checkbox.

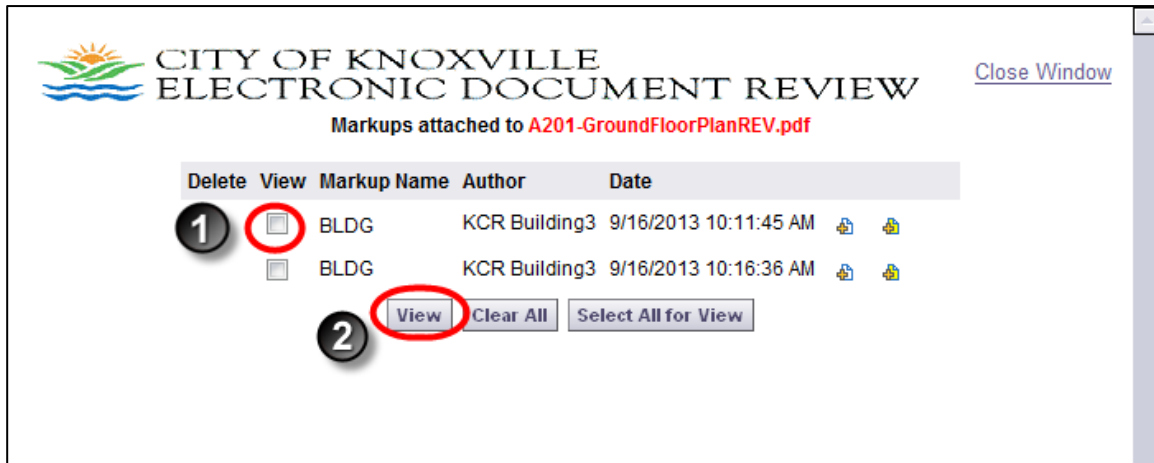


About Drawing Icons


A yellow notepad icon  indicates that *notes* are attached for the drawing. Click notepad icon to view notes. These are notes that have been attached to the individual drawing and are different than project notes.

The Pencil icon  indicates violations associated with the drawing. All violations are displayed using "Markups."

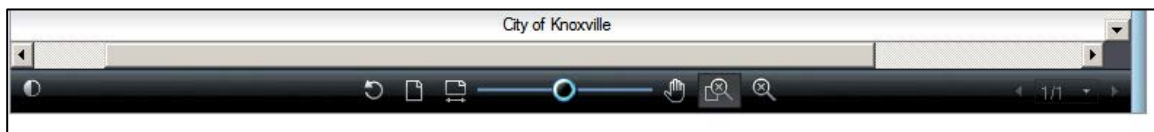
4. A list displaying the available markups will open. Select the markup you want to view by checking the applicable **View** checkbox (❶) and then clicking the **View** button (❷).



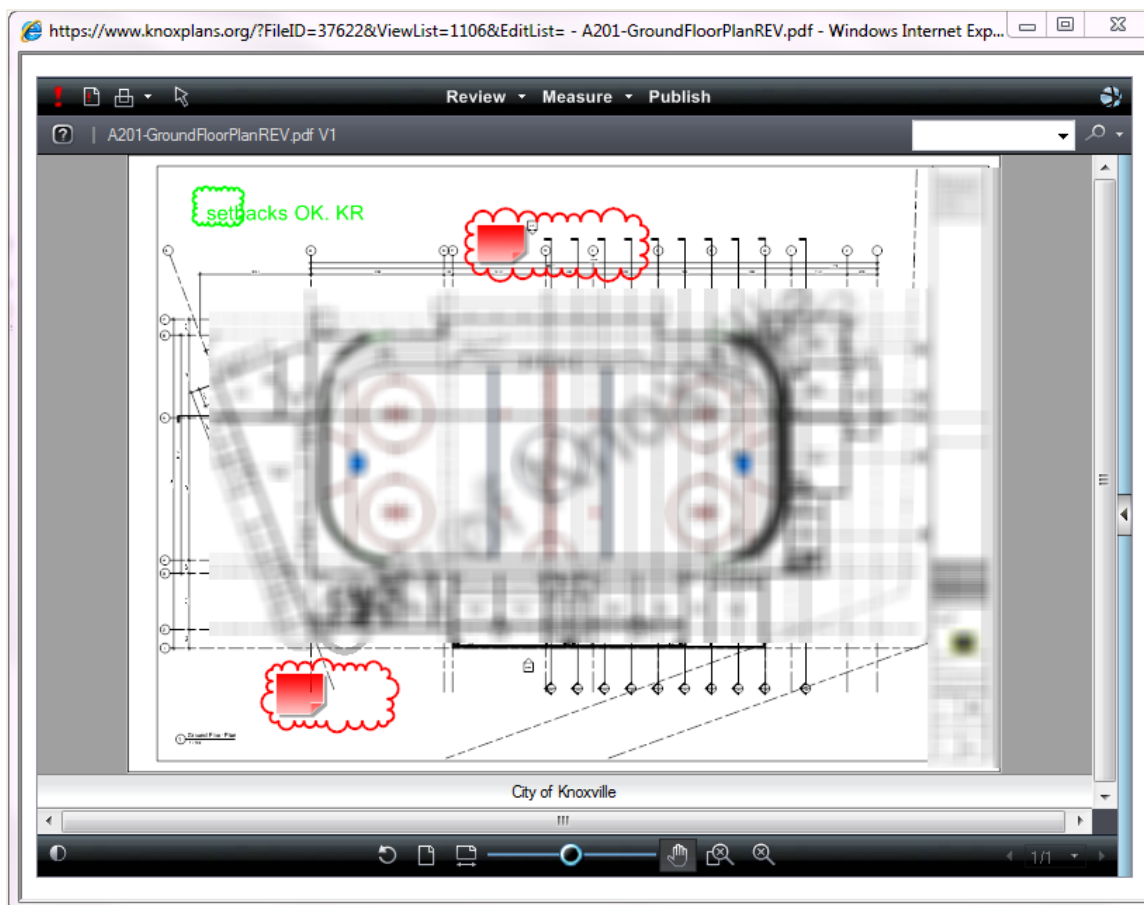
- ❶ The reviewer will usually name the markups in a consistent manner that reflects his discipline.

5. The drawing will open on the screen. To view certain sections of the drawing, use the slider control () on the Display Toolbar to "Zoom In" to a section on the drawing.

- The Display Toolbar can be found at the bottom of the drawing that is opened.



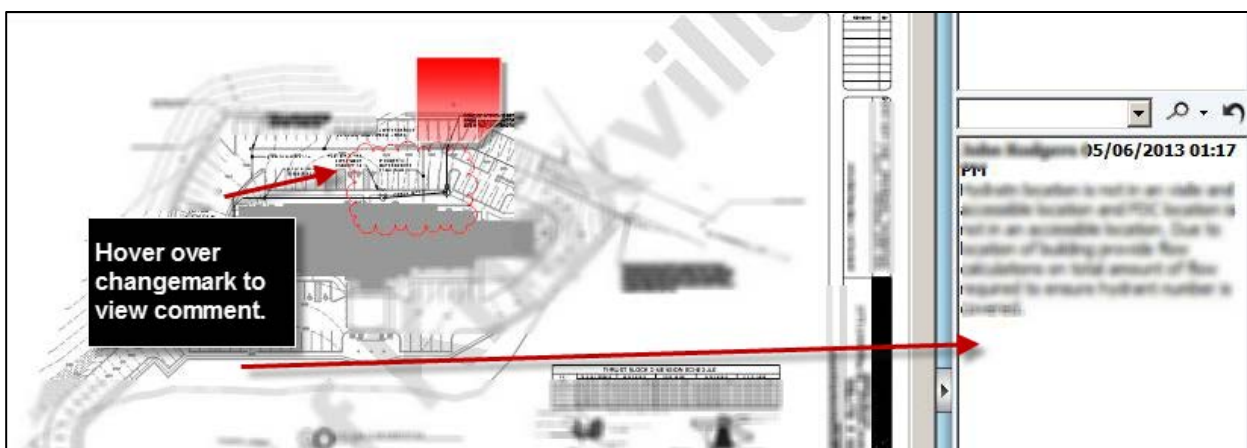
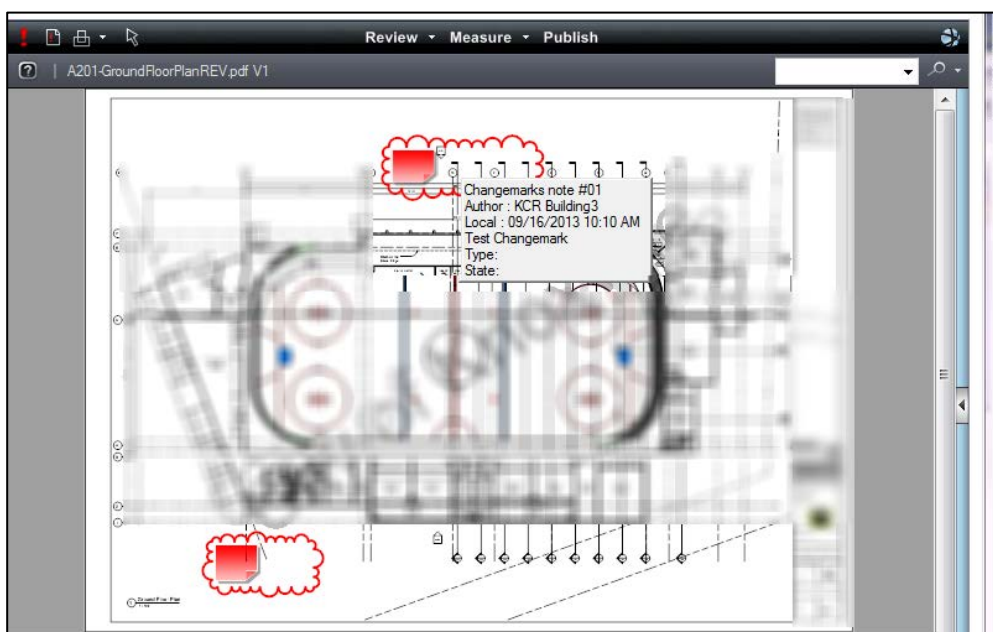
6. The markup drawing will display **changemarks** as applicable. The **changemarks** are color-coded and named according to the discipline that made them. There are two methods to view a changemark and its information.



REVIEW	Markup (Save As) Name	Markup Color
Building/Zoning/Arborist/Parking Spaces	BLDG	orange
Engineering/Parking	SITE	teal
Electrical	ELEC	blue
Mechanical/Gas	MECH, GAS	yellow
Plumbing	PLUM	yellow
Fire	Fire	red
Waste Water	KUB	green

i If you are unable to view drawings, please review "File Viewing Issue" in [Appendix A](#). If you continue to have issues, ensure all steps listed in [Appendix B](#) have been followed to install ProjectDox components.

7. You can view a changemark by hovering over it to view a popup window (**1st way to view changemarks**). Click on the changemark to see more detail

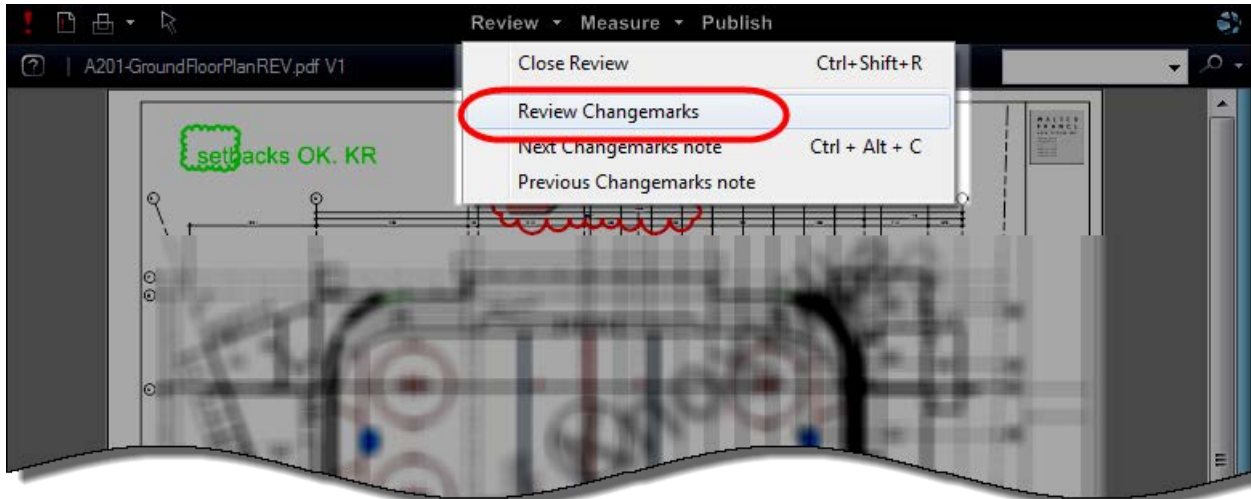


FOR HELP

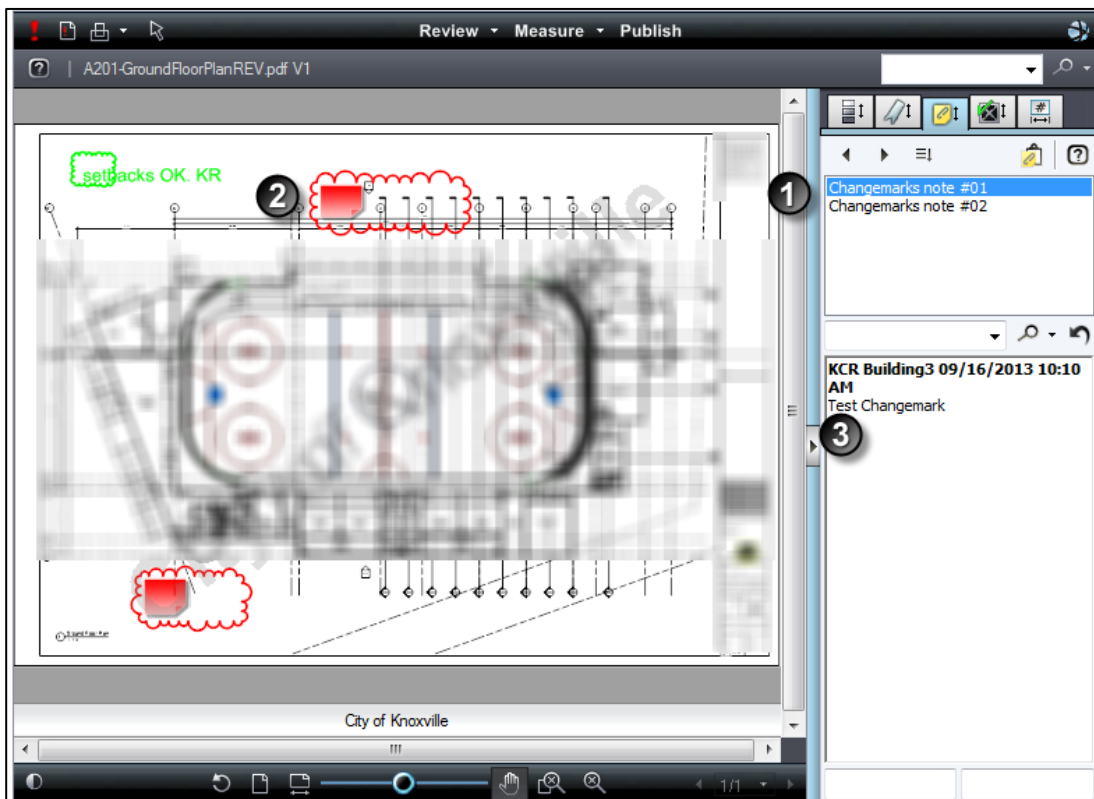
For further instructions on how to review changemarks, click the Question mark icon to open the help contents for the Brava viewer.



8. To view the list of specific changemarks, click the **Review** pull-down list and select **Review Changemarks** from the menu. (2nd way to view changemarks)



- a. A list of changemarks will be displayed at the right of the drawing. To view a changemark, select it from the TITLE box (see ❶). The drawing view will then zoom in on the location of the selected changemark (see ❷) so you can see the actual markup. To read the comment, look at the bottom of the right-panel section as shown in the example below (see ❸). As each changemark is highlighted, the comments will change accordingly.



- b. Repeat step **a.** for each changemark you wish to view.
 - c. When finished, click the **Review** pull-down list again and select **Close Review**. Select the markup to close and click **OK**. Continue until all markups have been closed.
9. When finished with reviewing your markups, you can begin making corrections to your plans. After uploading your plans in the next step, you will re-submit your review request. Do not “re-submit” the request until all plans have been uploaded again.

Things to Remember

- During the re-submission process, each drawing must retain the **same name** used at the time of the initial upload. A version number will be applied to these drawings.
- You will only need to re-submit the drawings where revisions were requested.

What Next?

If **approved**, you are finished and can go to **step #11** to print your plans once your building permit has been applied for and paid for. → *Step 11*

If **disapproved**, go to the next step to re-submit your corrected plans. → *Step 8*

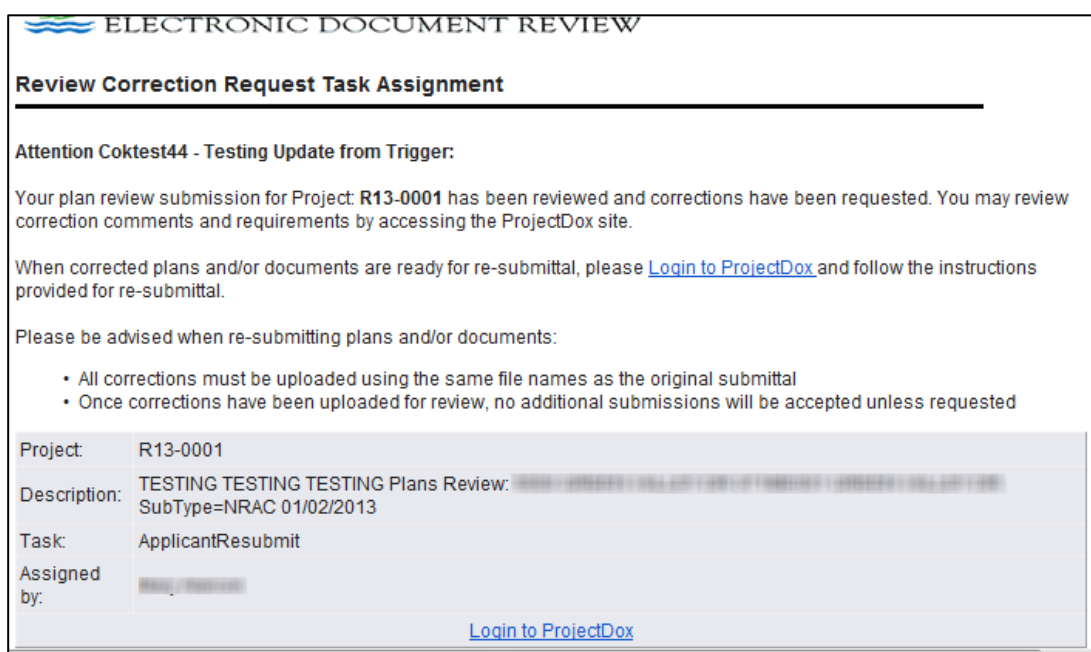
Step 8: Applicant Uploads Corrected Plans

Before Starting...

- Make sure you've compared your Conditions Report with your markups to make sure you've addressed all issues. Make corrections to your drawings as necessary and get ready to re-submit them for another review. All project documents will be located in the Documents Folder of your project.

During this step, you will upload corrected plans to your project as instructed in the "Resubmit Request" email that you received.

Sample Email



How to Upload Plans for a Second Review?


1. Prepare your corrected plans for re-submittal.
 2. Go to www.Knoxplans.org website and login to ProjectDox using your email address and password.
 3. Open your project and upload your revised plans. Refer to **step #3** (pg 12) for additional instructions on uploading your plans.
- i** It is important to note that all drawings must retain the same name used at the time of the initial upload. A version number will be applied to these drawings.

4. When finished, click on the **Workflow Portals** button. Your task list will be displayed at the right.
5. Click on the **Applicant Resubmit** task link. Click **OK** to confirm.

Task	Attached To	Status	Created On	Updated On	Updated By	Action
ApplicantResubmit	Applicant Group	Pending	9/19/2013 10:18:51 AM	9/19/2013 10:18:51 AM		

Page 1 of 1 (1 items)

6. An eform will open. Scroll to the bottom of the form and check each checkbox to indicate your compliance with the displayed statements.
7. Next, you are ready to inform the City that you have uploaded corrected plans and are now ready for a re-review. Click **Complete** button. Click **OK** to confirm. This will notify the City that your revised drawings have been uploaded into the project.


CITY OF KNOXVILLE
 ELECTRONIC DOCUMENT REVIEW

[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information | Resources | Checklist Report (0) | Routing Slip

Review Coordinator: Mary Alarcon (malarcon@cityofknoxville.org)
 Review Cycle: 1
 Workflow/Activity Name: Start_Plan_Review_Workflow_V1 / ApplicantResubmit
 Activity Instructions: Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.
 Current User Logon: Coktest44 - Testing Update from Trigger Na (cokwriter@gmail.com)

☐ PLAN REVIEW AND/OR ASSIGNMENT COMPLETE

Task Instructions

- ☒ I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "**Met**" or "**Not Met**". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.
- ☒ I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.
- ☒ I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

Best in Class Version 1.0

Things to Remember

- Corrected drawings must have the same file name as the initial uploaded file.

What Next?

Your plans have been re-submitted for review. The City's reviewers will now be re-invited to review your project. → *Step 9*

Step 9: Reviewers Perform Additional Reviews

City reviewers will re-review your plans as outlined in step 6. Only the reviewers that initially requested revisions will be invited to review the resubmitted plans.

While the project is in review, you can view the project status by viewing the Projects screen. You can also view the reviews and any markups that have been made.

- See instructions in **step #6** (pg. 25) on how to view the project status during review.

Things to Remember

- No files can be submitted during the review phase of the process.

What Next?


Wait for the email from the City letting you know of the plans review approval status.

If your plans review was **approved** (see step #7 for email), your approval email will come in the next step. → **Step 10**

If your plans review was **disapproved**, you will get a “Resubmit Requested” email. Go back to step #7 to review the comments and proceed to step #8 to re-submit your plans. → **Steps 7 & 8**

Step 10: Applicant receives Approval Email

As seen in step #7, you will only receive this email when your plans review have been reviewed and approved. Once you receive this email, you are finished until ready for the building permit. After the permit has been applied for and paid for, the approved plans can then be downloaded from ProjectDox and printed for use at your job site.

 This email will be sent by the Plans coordinator.

What Next?

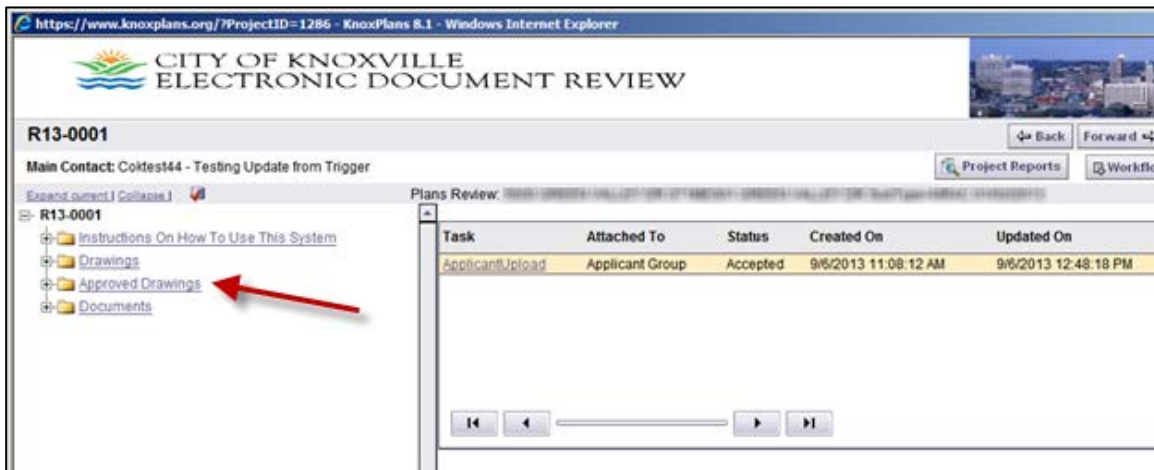
When the Contractor has applied for the building permit and paid the permit fee, a set of approved plans can be downloaded for use at your job site. → *Step 11*


Step 11: Applicant Downloads Approved Plans

When your building permit has been applied for and paid for by the contractor, you will be able to download your plans. You can also view and print your conditions report which lists any conditions of the approval.

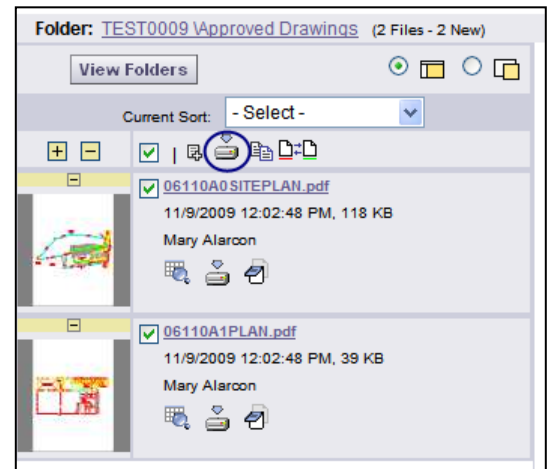
To Download Approved Plans:

1. Go to www.Knoxplans.org website and login to ProjectDox using your email address and password.
2. From the Projects screen, select your project by clicking on the project name.
3. Click on the **Approved Drawings** folder (at the left) to view the list of drawings.

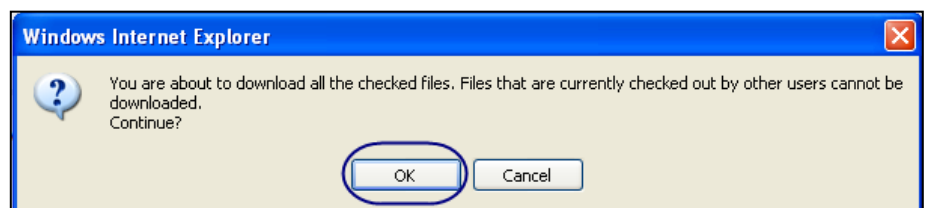


4. The list of drawings will open. Click the checkbox at the top of the folder list to select all the drawings. Click the **Download** icon  to download the stamped files.

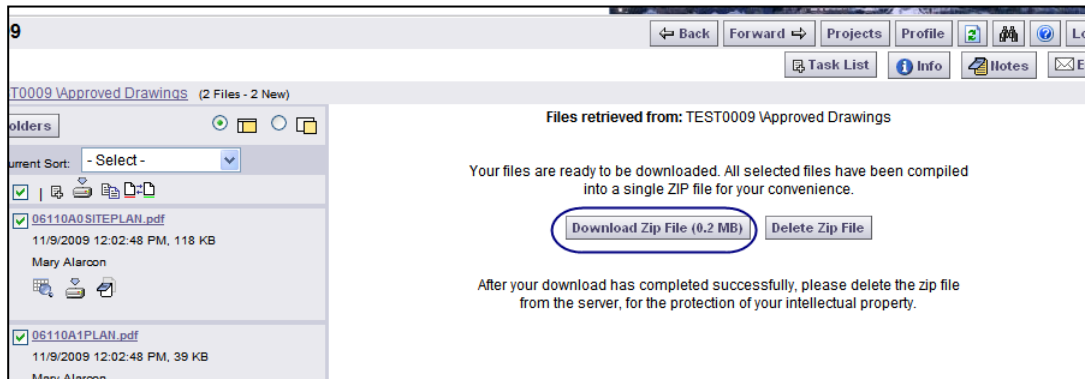
- ❗ If only downloading a few drawings, check the boxes for only the drawings you want.



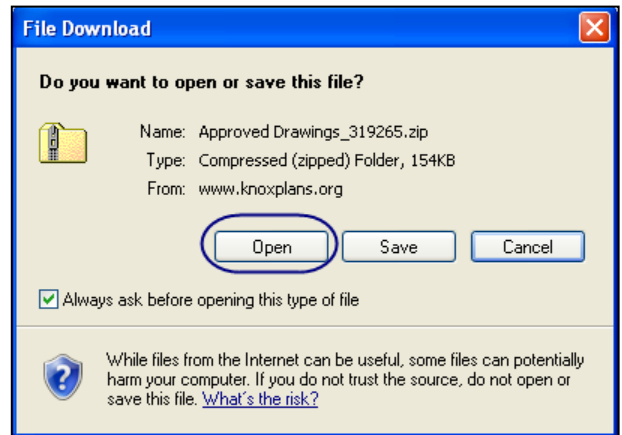
5. Click **OK** on message.



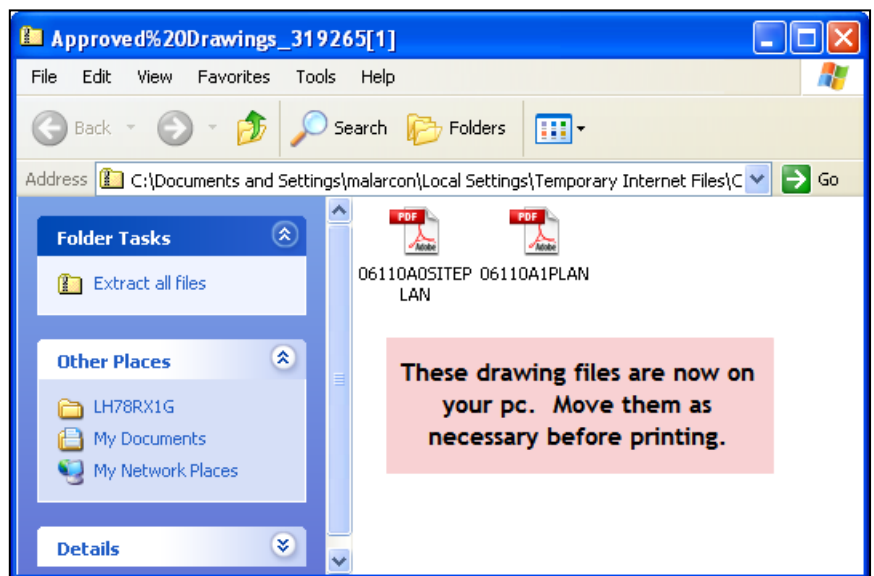
6. Click **Download Zip File**.



7. Click **Open** on File Download window.

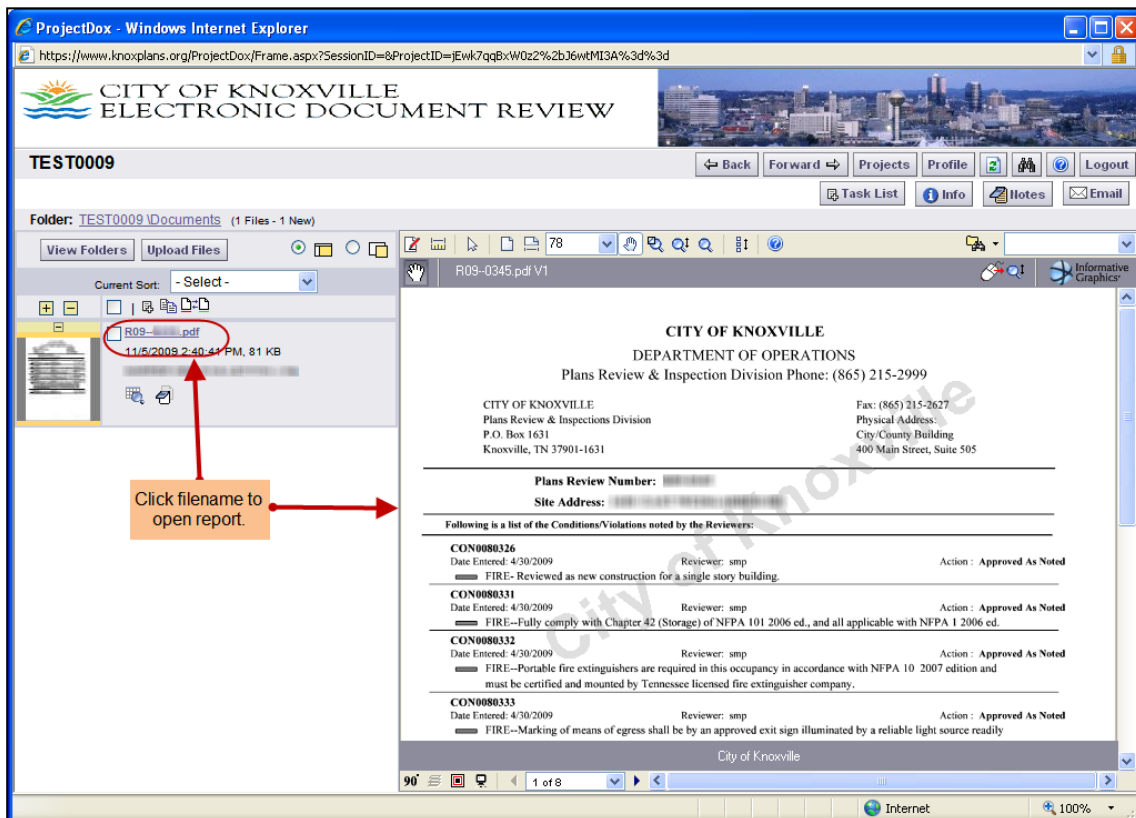
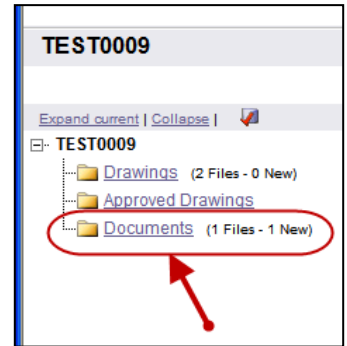


8. The download files will now be in a temporary file on your pc. From this location, you can save them to a disk or move them to another directory on your PC. When ready to print the drawings, open them in Adobe Acrobat and print.

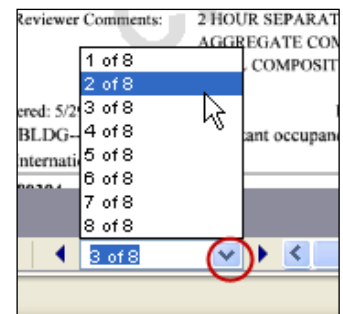


How to view Conditions Report?

1. While still in your Project Screen, locate the folders section at the left. Click on the **Documents** folder.
2. There will be a PDF file in the Documents folder containing your Conditions report (usually named **Rxx-xxxx_violations.pdf** where **xx-xxx** is name of project). The Conditions report is a list of special conditions and violations concerning your plans. Click on the filename to open the report.



3. The report will open at the right side of the screen. You can move to a different page by clicking on the arrow at bottom of screen and selecting another page.



4. The report can be printed by clicking on the printer icon and selecting **Print**. Select a page range or “All” and then click **Print** to continue.



5. When you logout or go back to the Projects screen, the Conditions Report will close.

Things to Remember

- You should only download plans that are in the “**Approved Drawings**” folder. These plans will have the City of Knoxville stamp on them.

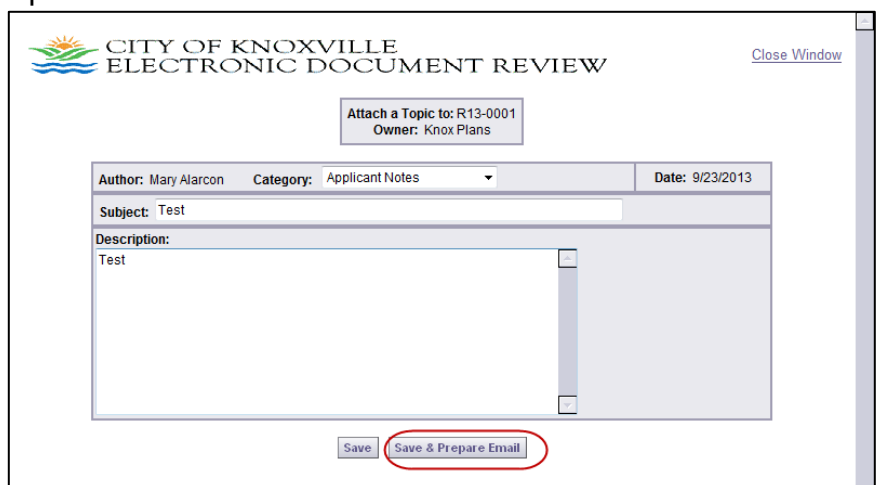
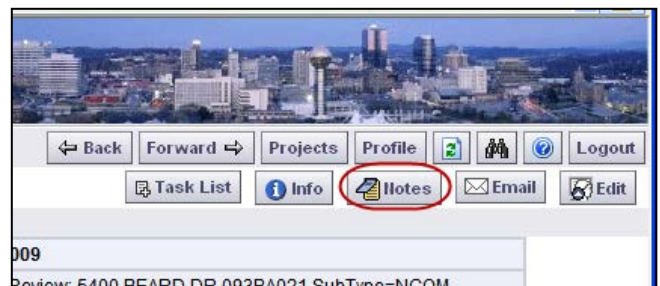
Topics and Notes

Topics are high level categories for discussion. Notes are additional conversation threads about a particular topic. They can be attached at both the project and file level and can be emailed to team members. You will add a note when you want to convey additional information to the reviewer. This information stays with the electronic permanent record of the project. It's easier to keep track of than separate emails to the reviewer.

- ❗ A topic must be added before a note can be added to it.
- ❗ When you add a note, you have an option to also email the note. This is the recommended method to immediately notify a project member of your comment.

How to add a Topic:

1. Select your project from the Projects screen.
2. Click **Notes** button. If the icon is yellow, then there are notes attached to the project.
3. Click **Add Topic**.
4. Choose a category for the topic. Topic categories are created and maintained by the System Administrator.
 - Applicants should choose Applicant Notes for the Category.
5. Enter a subject (or title) for the topic and a description.
6. Click the **Save and Prepare Email** button to save the topic and close the window.
7. You will be given a choice of who to send the comment to. Make your selections and click **Send** button at the bottom of the screen.



How to add a Note:

1. On the Notes screen, click on the applicable topic.
2. Click the **Add Notes** button in the *View Chosen Topic & Notes* page.
3. Type note in the bottom scrolling window of the *Add Note to Topic* screen.
4. Click **Save** to save your changes, or **Save & Prepare Email** to save your changes and send a notification email to the other project team members.
5. If emailing the note, you will be given a choice of who to send the comment to. Make your selections and click **Send** button at the bottom of the screen.

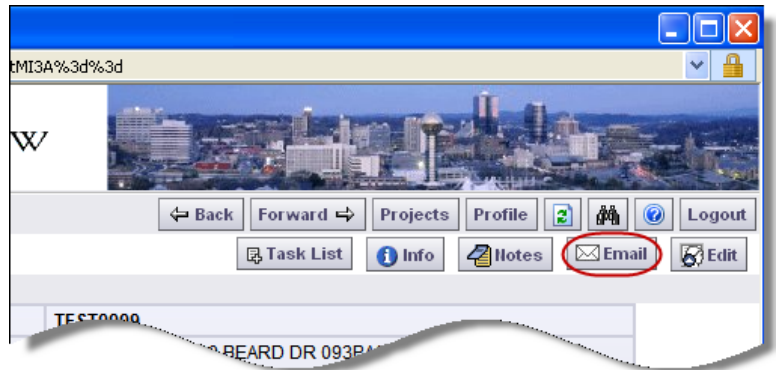
① It is recommended that you email new comments to the review team as applicable.

The screenshot shows a web browser window titled "ProjectDox - Windows Internet Explorer" with the address bar displaying "https://www.knoxplans.org/ProjectDox/AddNote.aspx?TopicID=368&ProjectID=553&FolderID=0&FileID=0". The page header features the "CITY OF KNOXVILLE ELECTRONIC DOCUMENT REVIEW" logo and a "Close Window" link. The main heading is "Add Note to Topic". Below this, a form contains the following fields: "Author: Mary Alarcon | Owner: Knox Plans | Project: TEST0009", "Topic Subject: Topic 1", "Description" (with a vertical scrollbar), and "Note Added" (with a vertical scrollbar). A pink rectangular box with the text "Type note here" is positioned within the "Note Added" field. At the bottom of the form, there are two buttons: "Save" (which is circled in red) and "Save & Prepare Email". The browser's status bar at the bottom shows "http://www.knoxplans.org/" and "Internet" with a 100% zoom level.

Team Mail

Team Mail is a convenient way to send team members updates and messages.

1. In the Project List, click the **Email** button. The Team Mail screen appears



2. The Team Mail selection dialog displays users by individual users and groups. Select the check box in the title bar to select all members. You can then de-select any groups or individuals individually. Clicking the header check box a second time clears all check boxes.

- ❗ Note that members of a Private Group will not show in the Team Mail list, but selecting the Private Group's check box will send the email to its members.

3. Enter a Subject and message body.
4. Click **Send Team Mail** to send your message.

- ❗ If you want to send an email to the City concerning your plan submission, look for an **Email-Project Coordinator** group in this list and select it.

ProjectDox - Windows Internet Explorer

https://www.knoxplans.org/ProjectDox/TeamMail.aspx?SessionID=8&ProjectID=jEwk7qqBxW0z2%2b36wtMI3A%3d%3d

CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW

Team mail for Project: TEST0009
Email type: Standard Mail

Subject: * Test Email

Body: *
Test of Team Mail

Check box to send mail to everyone

Users/Groups that will be emailed: *

	Name	Company	Email
<input type="checkbox"/>	Non Group Members		
<input checked="" type="checkbox"/>	Applicant Group		
<input checked="" type="checkbox"/>	HARPER HEATH & LETITIA J Na		COKWriter@hotmail.com
<input type="checkbox"/>	Building		
<input type="checkbox"/>	Electrical		
<input checked="" type="checkbox"/>	Engineering		
<input type="checkbox"/>	Fire		
<input type="checkbox"/>	GasMechanical		
<input type="checkbox"/>	Inspections Manager		
<input checked="" type="checkbox"/>	InspMgr1 KCR	TEST Reviewers	KCRInspMgr1@gmail.com
<input type="checkbox"/>	InspMgr2 KCR	TEST Reviewers	KCRInspMgr2@gmail.com
<input type="checkbox"/>	NewAddresses		

5. You can also access Team Mail from the Edit Topic, Edit Note, Add Topic, and Add Note screens by clicking **Save and Prepare Email**. The Subject and Message fields will be automatically populated. You can also access Team Mail by clicking the mail icon, such as at the top of the Project Info screen.

Things to Remember

- You will be provided with a list of users/project members to whom you can email for a stated project.

City of Knoxville Plans Submission Standards – Commercial (including multi-family dwellings)

- All drawings must be submitted in Adobe pdf file format.
- Pdf files must be electronically created and searchable.* Pdf files cannot be created by scanning or using free pdf print software.
- All drawing files must be a single sheet/page.
- The design professional's seal and signature must be on each drawing file.
- An index of drawing names and file names must be included as one of the files.
- Each set of drawings should include a Coversheet. Each coversheet must have a minimum of:
 - The Code Standards used in the design
 - Occupancy Class
 - Anticipated use (where applicable)
 - Construction Type
 - Building Area and Height Compliance
 - Occupancy Loading
 - Exit Information (exit width, number of exits)
 - Parking Calculations (where applicable)
 - Dwelling Unit schedule (residential Construction)
- Schedules and specifications can be submitted as multiple page document files.
- The lower right hand corner must be left blank on each drawing file for the placement of the City's approval seal.
- When a drawing file is resubmitted it must have the exact same name as the original.
- Any documents required by the Metropolitan Planning Commission (MPC) must be submitted by the applicant prior to plan approval.

**Please consult with the manufacturer of your software used to create your drawing files to advise you if your software supports a searchable pdf file or for a recommendation of an additional software package to purchase. Our research indicates most CAD packages support this feature and if not, the cost is minimal to purchase create pdf software. For example, Adobe 9 Pro software.*

City of Knoxville Plans Submission Standards – Residential (including 1 & 2 family dwellings)

- All drawings must be submitted in Adobe pdf file format. Scanned drawings are acceptable.
- Every drawing shall be drawn to scale and at a minimum contain the following
 - An accurate depiction of the lot
 - Corner elevations and lot dimensions
 - The location and size of the driveway
 - The residence located on the site plan with the setbacks indicated on the plan
 - Finished floor elevation
 - Location of inverted sewer elevation
- When submitting for duplex, the construction for the rated fire separation must be clearly shown.
- When a drawing file is resubmitted, it must have the exact same name as the original.
- If a residential overlay (H1, IH-1, NC-1, TND-1, etc.) is involved; the applicant will have to upload the Certificate of Appropriateness, Evaluations, Site Plan, and any other necessary documents provided by the Metropolitan Planning Commission (MPC) before the plans review process can be started.
- If a Use on Review is required (accessory dwelling units in R-1EN, duplexes in R-1, etc.), then the applicant must upload a copy of the documentation provided by the Metropolitan Planning Commission (MPC) prior to approval the plans.

Appendix A: ProjectDox System User Requirements - Troubleshooting

Component Troubleshooting

The following section reviews common issues with the installation of the components, along with recommendations for resolution. Most issues are related to lack of permissions to install the required components on the PC, or the enabling of the UAC during the installation process.

Unable to Batch Upload

ISSUE:

Unable to upload more than a single file at a time to the upload files box.

Install Silverlight Now'. The right section, titled 'Metadata (Applied to all uploaded files)', contains a checkbox labeled 'Inherit metadata for versioned files' with a red asterisk and the text '* Required field' to its right. Below this is a 'File Type: *' dropdown menu. At the bottom of the page, there is an 'Upload URL:' section with a 'URL Display Name:' text input field, a 'URL:' text input field, and an 'Upload URL' button."/>

Planroom - Windows Internet Explorer

https:// /ActiveXUpload.aspx?FolderID=1

[Close Window](#)

Upload files:(Drag-n-drop available for Silverlight only)

To use the enhanced upload tool, including drag and drop, please download the Silverlight application framework. [Install Silverlight Now](#)

Metadata (Applied to all uploaded files)

☐ Inherit metadata for versioned files * Required field

File Type: *

Upload URL:

URL Display Name:

URL:

RESOLUTION STEPS

- Install the Silverlight Control to allow for batch and drag-n-drop upload. The installer can be obtained from the link **“Install Silverlight Now”**.

- Successfully installed Silverlight control will provide a screen like the one below (metadata section is optional, depending on project configuration):

The screenshot shows a web application window titled "Windows Internet Explorer". The interface is divided into several sections:

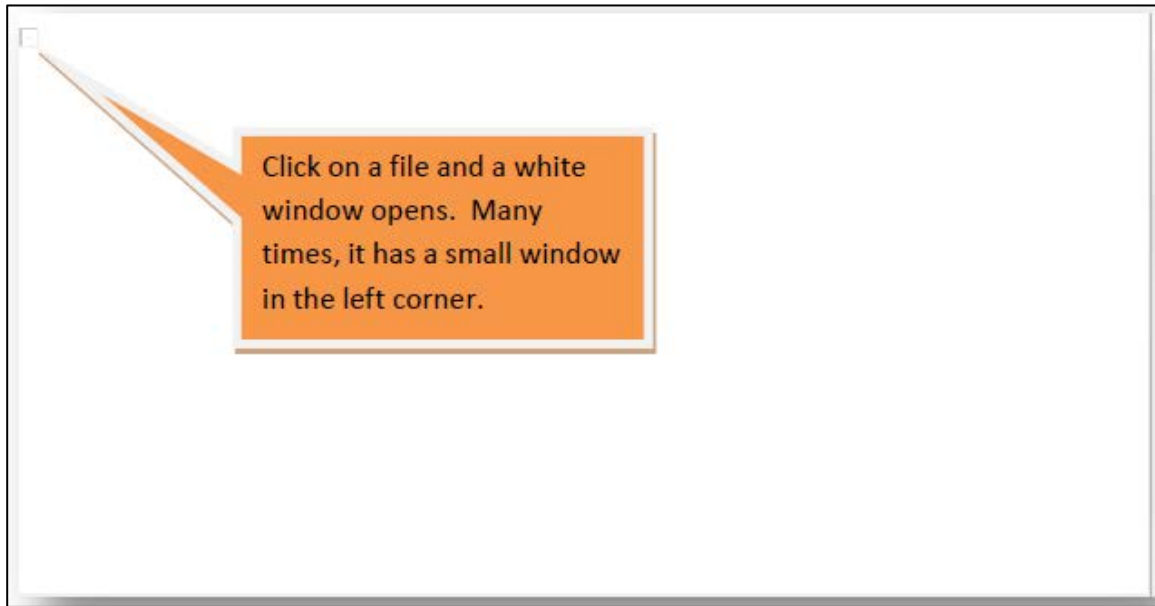
- Upload files:** A header with the text "(Drag-n-drop available for Silverlight only)". Below it is a "Selected Files:" section with a large empty area for file selection. A "Browse" button is located at the bottom right of this section.
- Metadata:** A header with the text "(Applied to all uploaded files)". Below it is a checkbox labeled "Inherit metadata for versioned files" with a red asterisk and the text "* Required field" to its right. Below the checkbox is a "File Type:" dropdown menu with a red asterisk to its left.
- Upload URL:** A header with the text "Upload URL:". Below it are two input fields: "URL Display Name:" and "URL:". An "Upload URL" button is located at the bottom right of this section.

A "Close Window" link is visible in the top right corner of the application area.

File Viewing Issue

ISSUE:

User selects to view a file or view a markup on a file. A blank white window or a blank white window with a small box in the upper left window appears.



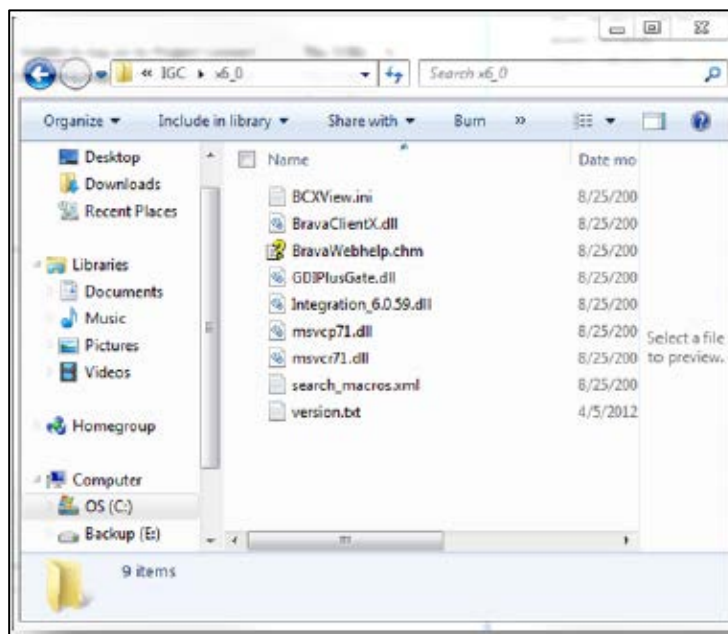
RESOLUTION STEPS

First Time User:

- If running Vista or Windows 7, verify that UAC is disabled. If UAC was enabled during the installation, disable UAC (including the reboot), uninstall the components, and delete the IGC folder from your profile before re-installing.
- Verify the ProjectDox site is in your list of **"Trusted Sites"**.
- If issues persist, increase the permissions for the user account on the PC to Admin/Power User Rights. This should allow the components to download.

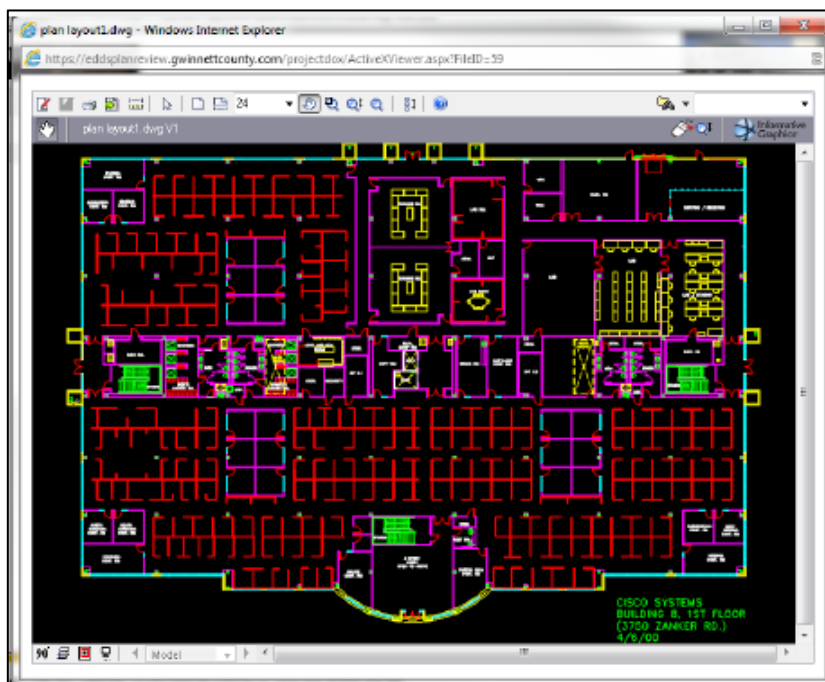
Return User:

- If installing updated components as a result of a ProjectDox upgrade ensure that the former Components have been uninstalled by uninstalling the ProjectDox Components from the Control Panel.
- Delete from your profile the contents of the IGC folder C:\Users\YourProfileName\[x6_0 or x7_0]
 - X6_0 is for ProjectDox versions 7.2-7.5
 - X70_ is for the ProjectDox Versions 7.7



- If running Vista or Windows7, verify that UAC is disabled. If UAC was enabled during the installation, disable UAC (including reboot), then uninstall the components, and delete the IGC folder from your profile before re-installing.
- Verify the ProjectDox site is in your list of "Trusted Sites".
- If issues persist, increase the permissions for the user account on the PC to Admin/Power User Rights. This should allow the components to download.

Once the components are successfully installed when a file is selected for viewing, it should appear with the image in the new window or in the frame of the application.



Appendix B: KNOXPLANS for New Users

Welcome to KnoxPlans

The City of Knoxville recommends that KnoxPlans (aka “ProjectDox”) run on PC operating systems up to and including Windows 7 32-bit (Windows XP, Windows Vista, and Windows 7 32-bit) and Internet Explorer 8 and higher.

Additionally, the software vendor also suggests that Windows 7 64-bit (Windows XP, Windows Vista, and Windows 7 64-bit) and Internet Explorer 9 and higher can be used on the client’s PC with Knoxplans. When using Internet Explorer (IE, any version), the 32-bit version must be used.

Please note that in order for this application to work you must **first** complete the following steps when you login for the first time. Since you will be installing software, you must have rights on your pc to perform the installation.

A. Before Installing ProjectDox Client Components

In this section:

- *Pop-Up Blocker*
- *Configuring Pop-Up Blocker*
- *ProjectDox Client Components*
- *Turning Off UAC in Windows Vista and Windows 7*
- *Adding Knoxplans to Your Trusted Sites*
- *Turning off Protected Mode in IE 8*
- *Setting Compatibility View Settings for Versions IE 8 and higher*

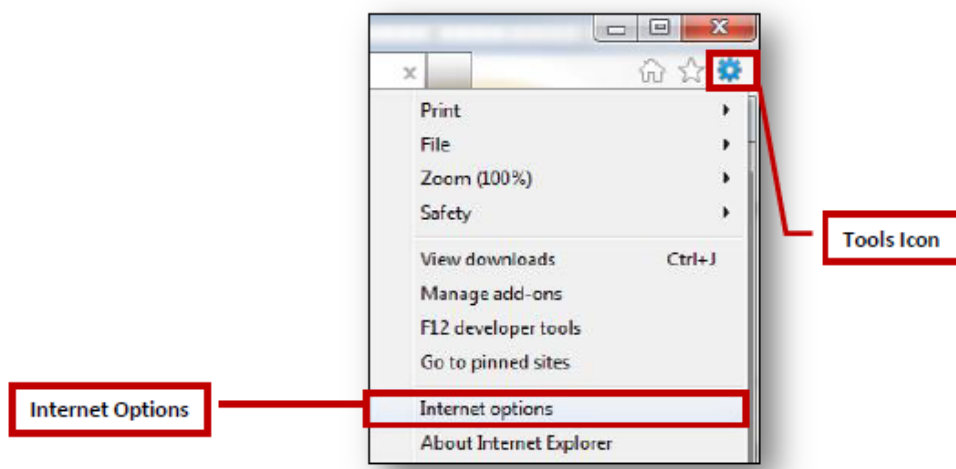
Pop-Up Blocker (IE)

ProjectDox uses pop-up windows (browser windows with no toolbars). If you log in, but no ProjectDox window appears, or a warning is received, you probably have a pop-up blocker that is preventing the main project window from opening. You need to allow ALL pop-ups for the ProjectDox site. You can do this in one of two ways:

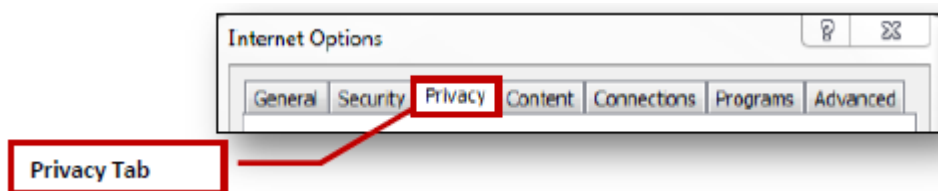
1. Disable pop-up blockers entirely.
2. Configure blocker to allow pop-ups for specified sites.

Configure Pop-Up Blocker in Internet Explorer

1. Navigate to Internet Options for your version of Internet Explorer (IE). Instructions below are based on IE9.
 - a. Select the **Gears** icon (Tools) seen in blue.
 - b. Select **Internet Options**.



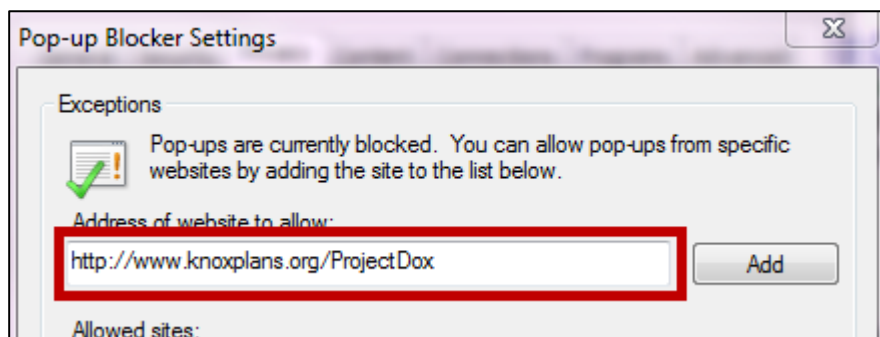
2. Click the **Privacy** Tab to set-up an exception for the ProjectDox site.



3. Click the **Settings** button.



4. In the Pop-Up Blocker Settings Window, enter the Knoxplans site URL.



5. Click the **Add** button.
6. Click to **Close** the Pop-up Blocker Settings window.
7. Click the **OK** button for the Internet Option window.

ProjectDox Client Components

Sometimes users will encounter errors or issues as a result of incomplete installation of the client components. This is often caused by permissions issues. The instructions in the next section (**B.**) proved useful in resolving the security/permissions issues and getting a successful installation.

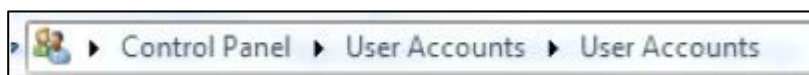
① **Note** – The account executing these steps will need administrative privileges on the computer.

If the operating system is Vista or Windows 7, you will need to turn OFF User Account Controls (UAC) before installation. Additionally, if using Internet Explorer 8 (IE 8), you will need to turn off protected mode. (Apparently turning off UAC in Windows 7 also disables protected mode for IE8.)

Turning Off UAC in Windows Vista and Windows 7

Disabling of the UAC control should be discussed with your network administrator prior to making changes to your system if applicable. In all cases, after the installation is complete and each of the actions have been performed once (uploading files, viewing files, downloading files, and viewing help, as applicable) the UAC control can be returned to the former setting.

1. From the Control Panel, open **User Accounts**.



2. Click the "Turn User Account Control on or off" (Vista) or "Change User Account Control Settings" (Windows7) link.

3. Update the UAC by following the below:

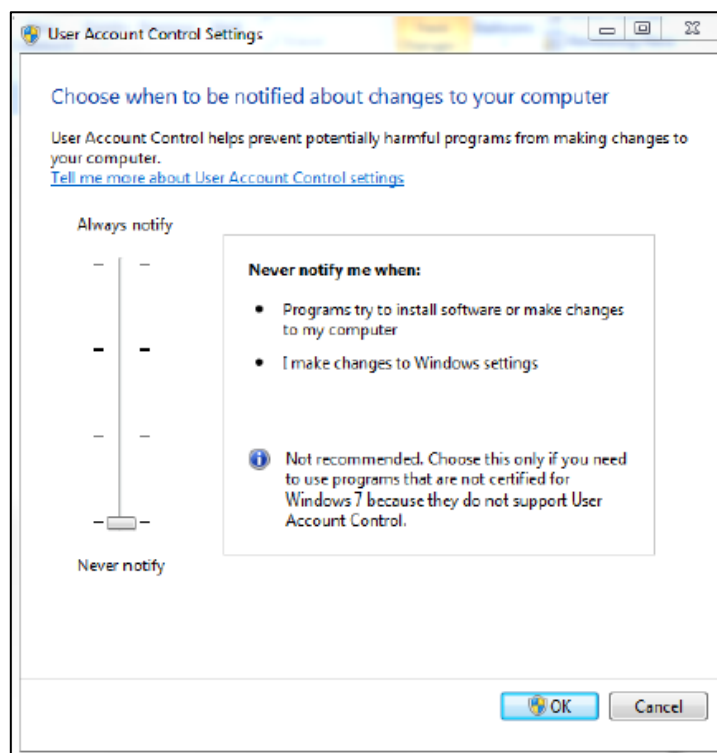
- **VISTA:** In the "Turn on User Account Control (UAC) to make your computer more secure" options screen, clear the checkbox for "Use User Account Control (UAC) to help protect your computer".
- **WINDOWS 7:** Click and drag the slide control to "**Never Notify**".

4. Click "**OK**" and restart the system.

Note: The system must be restarted for the UAC changes to take effect.

Note: The User's permissions level/rights will affect how the UAC works.

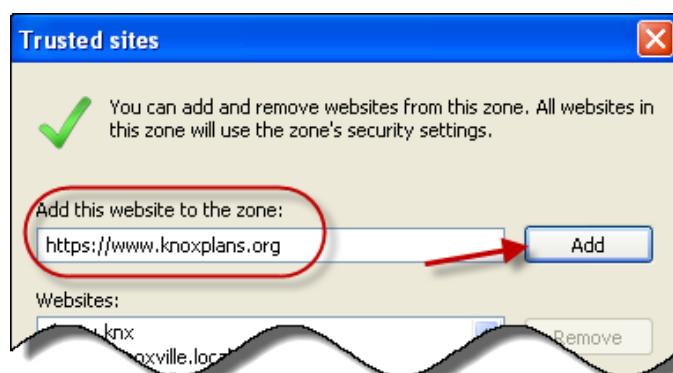
Note: After successful installation and one time usage of the ProjectDox Components, the system's **UAC** control can be returned to the former setting. A reboot will be required for the change to take effect.



Adding Knoxplans to Your Trusted Sites

ProjectDox loads ActiveX controls onto your pc so that you can view drawings and markups. Before the controls can be loaded, the Knoxplans Site (www.knoxplans.org) must be added to your list of Trusted Sites in your Internet Explorer security settings.

1. Select **Tools>Internet Options** from the menu and open the **Security Tab**.
2. At the top, select the **Trusted Sites** zone.
3. Click the **Sites** button.
4. Type <https://www.knoxplans.org> in the top field and then click **Add**.
5. Click **Close** when finished.
6. Click **OK** to exit the Internet Options window.



Turning off Protected Mode in IE 8

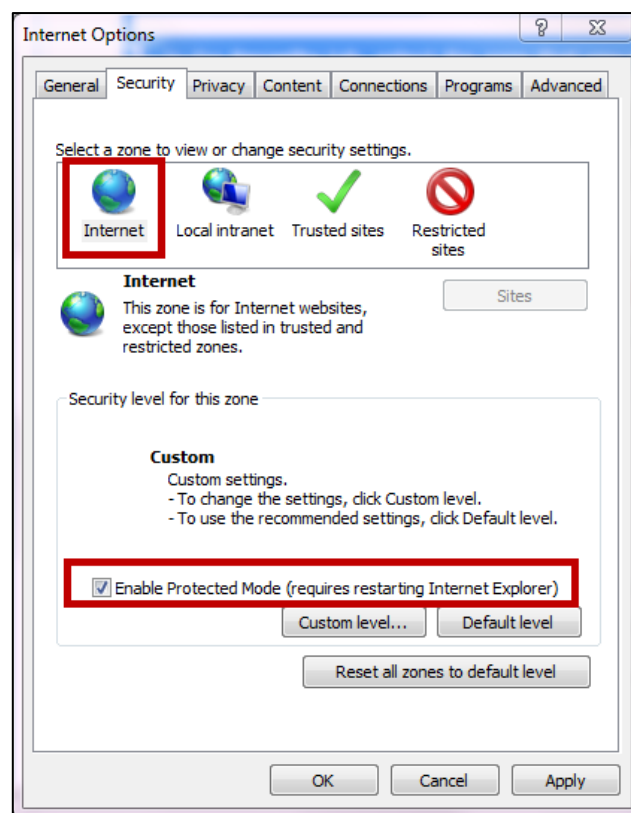
- If you turn off UAC (see top of previous page), then this will also disable protected mode for all users on the computer no matter if you have protected mode turned on or off in Internet Explorer below.
- You must have UAC set to the default level or higher to be able to turn on Protected Mode in Internet Explorer.

These instructions explain turning off protected mode in IE8 (apparently turning off UAC in Windows 7 also disables protected mode for IE8). ProjectDox uses iMarkup plug-ins. After successful installation and testing of the plug-ins, you can turn the Protected Mode in IE8 back on.

1. Open Internet Explorer.

NOTE: In Windows 8, this would only apply to the IE10 desktop version, and not the IE10 Metro (Windows UI) version.

2. Select **Tools > Internet Options** from the menu bar.
3. Click on the **Security** Tab. On the Security tab, select the zone that you want to turn protected mode on or off in.
4. Check the **Enable Protected Mode** box, and click **Apply**.
5. Repeats steps 3 - 4 if you want to turn protected mode on or off for any other zone.
6. When done, click **OK**.

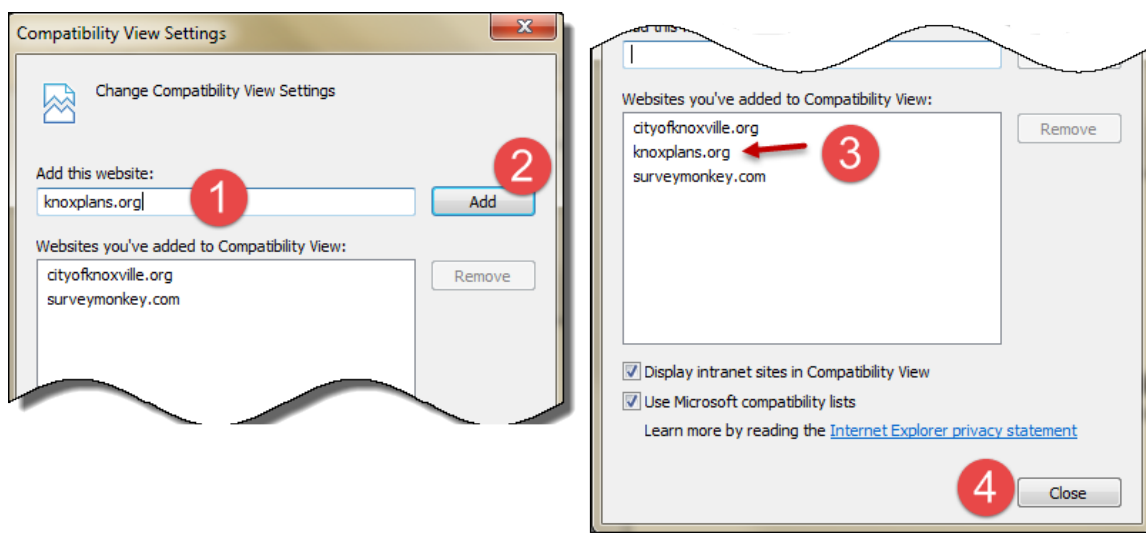
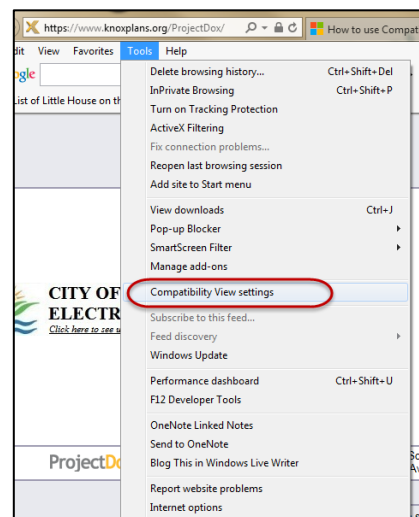


Setting Compatibility View Settings for Versions IE 8 and higher

The Knoxplans website might appear blank or might not display correctly in Windows Internet Explorer 8 and higher. One possible explanation: The site might have been designed for an earlier version of Internet Explorer.

These instructions describe how to use the Compatibility View Setting feature in Internet Explorer 8 and higher to view websites that were designed for an earlier version of Internet Explorer.

1. Close all open browser windows.
2. Open a new session of Internet Explorer.
3. Select **Tools > Compatibility View Settings** from the menu bar.
4. In the top field, enter www.knoxplans.org (Ref ❶).
5. Click **Add** button (Ref ❷).
6. The website will then be shown in the list of sites to be shown in *Compatibility View* (Ref ❸).
7. When finished, click **Close** (Ref ❹).



- ❶ **Please note** that if you upgrade your Internet Explorer browser while using Knoxplans and you experience problems, you may have to perform these instructions again to re-set your Compatibility View settings.

B. Installation of ProjectDox Client Components

In this section:

- *Installation of ProjectDox Program*
- *Installation of Silverlight*
- *Installation of Viewer Component (IE)*

Installation of ProjectDox

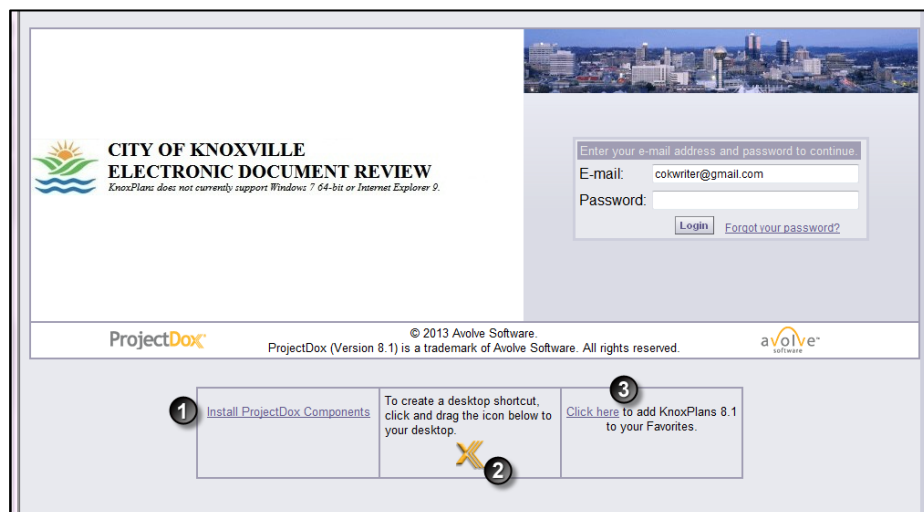
ProjectDox requires the installation of ActiveX controls to be able to perform certain actions: Uploading Files, Downloading Files, Viewing Files, and Viewing Help Information. There are two ways users can install the controls:

- A. The link to an MSI file for installing the ActiveX controls is available from the login screen.
- B. If permissions for the PC allow ActiveX download and installation, the user may elect to install the components for the four respective actions the first time each is performed.

1. Install ProjectDox components necessary for the application.
 - a. In your Internet Explorer window, go to the following site: www.knoxplans.org.
 - b. A login screen will open. Click on the **Install ProjectDox Components** link (❶, below) at the bottom left corner of the screen.
 - c. The application will install the necessary components for the system to function correctly. This may take five minutes.

❶ **Note** – If missing any components while using ProjectDox, a prompt will be displayed asking to install the necessary software. If this happens, follow the screen instructions to install the necessary components. Remember; if you are running IE8, Protected Mode must be turned off for successful installation of these components.

❶ You may also want to create a Desktop shortcut to **www.knoxplans.org** (ref link at ❷) and add it to your favorites (ref link at ❸).



If using the MSI from the login page, the user can accept the defaults to run the MSI and install the controls. If not using the MSI, then after logging in to the site, the user will be prompted by the browser to install the ActiveX control (yellow bar at top of the screen or at the bottom of the screen depending on system version) when attempting to perform any of the above actions. If the user's network requires Administrative access to download ActiveX controls, the user will NOT be prompted nor will the MSI on the login screen install. The user will need to contact their network administrator to get access to download these controls.

Before installing the components, verify the items below. Instructions are provided in the following sections on how to add the site as Trusted, and how to temporarily disable UAC.

1. Add ProjectDox site as a Trusted Site.
2. Disable UAC (Vista and Windows7 users only).
3. Recommend Admin/Power User Rights to PC for proper installation.
4. Verify System Requirements for Silverlight Control.

Installation of Silverlight

① This is for *Batch* and *Drag –n-Drop* Upload Capabilities

ProjectDox provides a default upload component with no additional installation required. It is limited to five (5) file uploads selecting a single file for each row. An example of this default component is seen below and accessed when the **Upload Files** button is selected from a folder.
















Batch upload capability, along with the “Drag-n-Drop” feature for uploading, is available with the installation of the Silverlight Control. The below instructions will walk the user through installation and list the system requirements.

The screenshot shows a web browser window titled "Planroom - Windows Internet Explorer" with the address bar displaying "https:// /ActiveXUpload.aspx?FolderID=1". The page content is divided into two main sections. The left section, titled "Upload files:(Drag-n-drop available for Silverlight only)", contains five rows, each with a text input field and a "Browse..." button. Below these rows are "Reset Fields" and "Upload" buttons. A note states: "To use the enhanced upload tool, including drag and drop, please download the Silverlight application framework. [Install Silverlight Now](#)". The right section, titled "Metadata (Applied to all uploaded files)", contains a checkbox for "Inherit metadata for versioned files" (marked as a required field) and a "File Type:" dropdown menu. At the bottom of the page, there is an "Upload URL:" section with a text input field for "URL Display Name:", another for "URL:", and an "Upload URL" button.

8. Verify your system requirements.

- Make sure you are running a Silverlight-compatible operating system and browser, and that you have uninstalled any previous version of Silverlight.

For Windows Internet Explorer users:*Browsers Supported:*



Operating System	Internet 9	Internet 8	Internet 7	Internet 6	Firefox 3+	Safari 3+	Chrome 4+
Windows7			-	-		-	
Windows Vista				-		-	
Windows XP SP2, SP3	-					-	
Windows 2000 SP4 + KB 891861	-	-	-		-	-	-

For Macintosh users:

If you are installing Silverlight on a Macintosh system, the following requirements must be met:

- Silverlight versions after 1.0 run only on Intel processor based Macintosh (not PCC processor)
- Minimum Intel Core Due 1.83-gigahertz (GHz) or higher processor with 512-MB of RAM

Mac System requirements for Silverlight 5

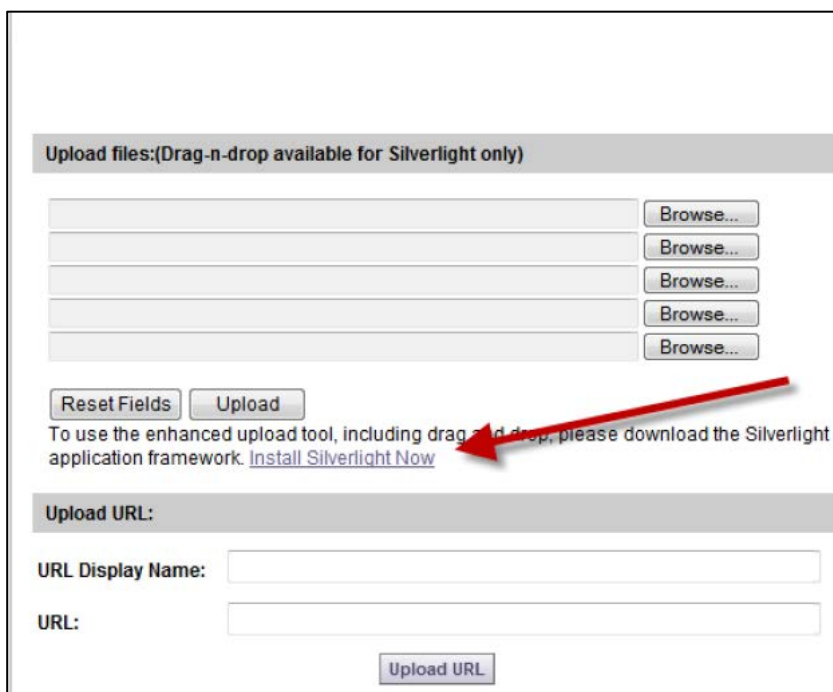
Silverlight Version	Operating System	Firefox 3+	Firefox 3.6+	Safari 3+	Safari 4+
Silverlight 5	Macintosh OS 10.5.7 + (Intel-based)	-		-	

Mac System requirements for Silverlight 4

Silverlight Version	Operating System	Firefox 3+	Firefox 3.6+	Safari 3+	Safari 4+
Silverlight 4	Macintosh OS 10.4.11+ (Intel-based)		-		-

9. Click the link "Install Silverlight Now" to download and install. Download also available at:

<http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx>



Upload files:(Drag-n-drop available for Silverlight only)

Browse...
Browse...
Browse...
Browse...
Browse...

Reset Fields Upload

To use the enhanced upload tool, including drag and drop, please download the Silverlight application framework. [Install Silverlight Now](#)

Upload URL:

URL Display Name:

URL:

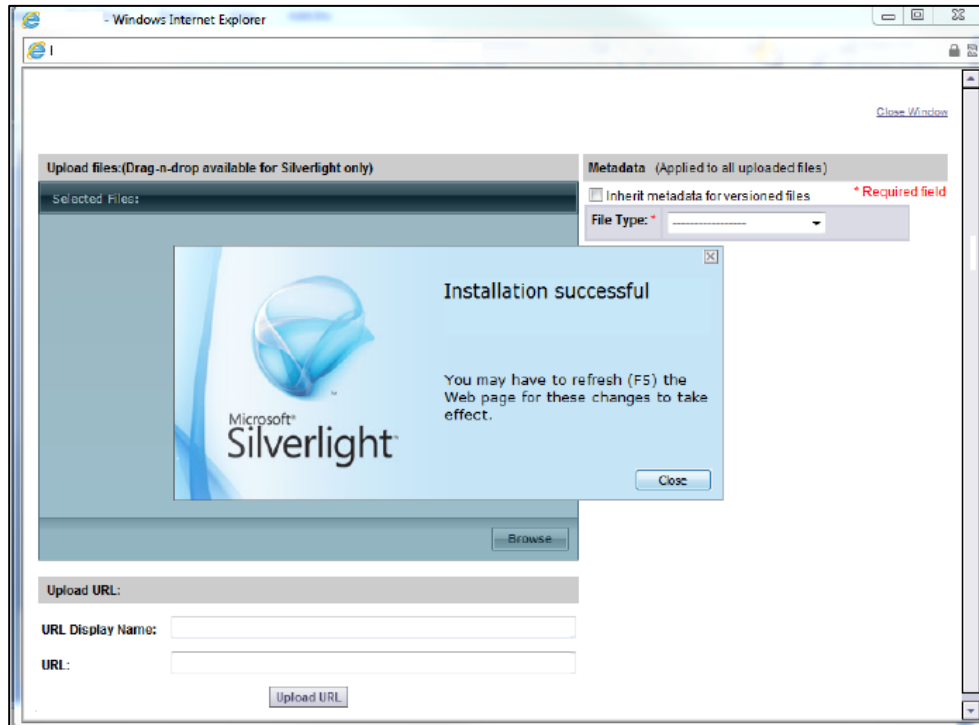
Upload URL

For Mozilla Firefox users:

- Save Silverlight.exe control to your hard disk.
 - Once the download is finished, click **Open**.
 - The installation starts.
10. If prompted, the user may click to **Save** the Silverlight.exe to their desktop, or click **Run** to install the component without saving and download to their system.
11. Click '**Install now**' after reviewing the license agreement and privacy statement.



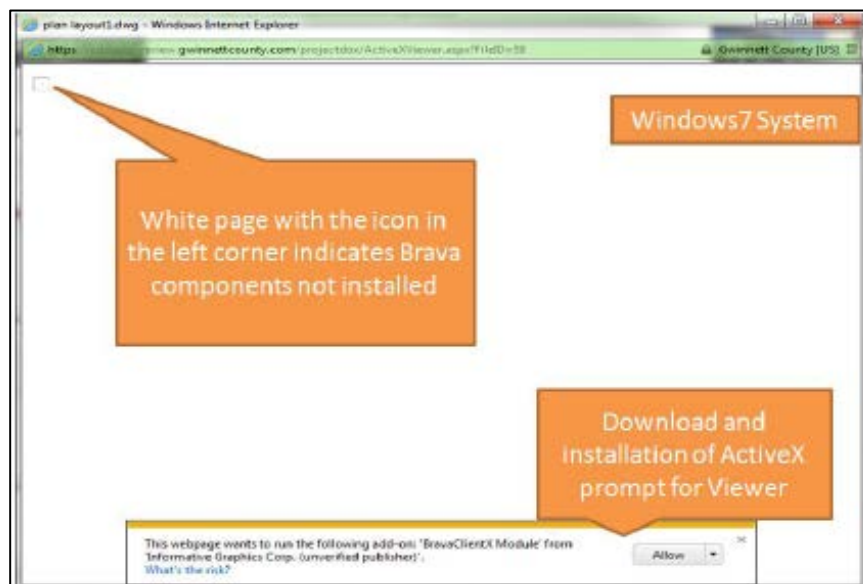
You can now use Silverlight.



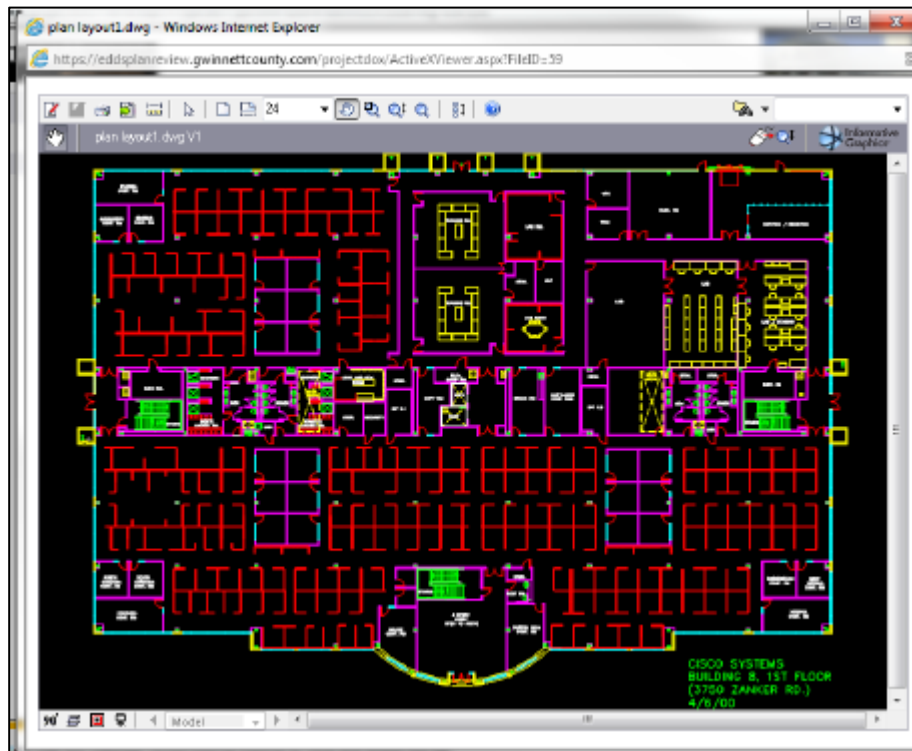
Installation of Viewer Component (IE)

If not installing from the login page, and using the prompts when opening a file for the first time, the below screen will display with a white background instead of the selected file.

- Look for the ActiveX tool bar at the top or bottom (Depends on operating system) of the page.
- Click **Allow** to allow the installation of the *BravaClientX* Module.



- After successful **installation**, the file can be selected again to be viewed.



Once you have completed the above steps, you are ready to **login** to the system for the first time.

C. Login & Change Password

1. Click the **Login to ProjectDox** link at the bottom of the invitation email you received.

- i** This email has the user login and temporary password that you will need to login. Future emails will not contain a temporary password.

**CITY OF KNOXVILLE
ELECTRONIC DOCUMENT REVIEW**

Project Initiation

Hello Coktes44 - Testing Update from Trigger Na:

Thank you for choosing to use the City of Knoxville Electronic Review. Your application for [Project Name] - Plans Review: 5600 GREEN VALLEY DR 071ME001 GREEN VALLEY DR SubType=IRAC 01/02/2013 has been processed and a project created.

You will be receiving an invitation shortly to upload your drawings.

User Login	tarchitect@outlook.com
Temporary Password	C7D9C6D
Project Permit #	R13-0001
Plan Check Coordinator	Knox Plans
Plan Check Coordinator's Email	knoxplans@cityofknoxville.org

Remember for Login

[Login to ProjectDox](#)

Contact the Plan Check Coordinator if you have questions regarding this project. Please do not reply to this email.

2. The login window will open. In the E-mail field, type the **User Login** information as listed in your invitation email.
3. In the Password field, type the **temporary password** as listed in the same email. You will be given an opportunity to change it.
4. Click **Login**.

REVIEW

Enter your e-mail address and password to continue.

E-mail:

Password:

[Login](#) [Forgot your password?](#)

If you forget your password later, click this link to have it sent to your email

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avc soft

5. This will take you to the *User Profile* screen. (Required fields display with colored highlight.)
6. In the **Change Password** section, enter your new password in the first two fields (**Ref. ①**, below).
7. In the **Password Reset Question & Answer** section, enter a security question and answer so that your password can be reset if necessary (**Ref. ②**, below).
8. Enter remaining contact information as applicable on the screen.

9. You can access this screen again at any time by clicking the **Profile** button in the main ProjectDox button bar.
10. Click **Save** when you are finished.

❗ To go to the home page, click **Projects** button at the top right of the screen.



D. Testing ProjectDox Components

1. Locate your project and open a project drawing.
2. If there are any markups, open Markups on a project drawing to see if you can view them.

E. Troubleshooting – How to Uninstall ProjectDox Client Components

Perform a clean uninstall and reinstall of the client components by following these steps:

Remove ALL ProjectDox components on the client

1. Check for presence of the program, and remove if found, using either steps A. or B. depending on version of operating system you are using:
 - a. VISTA, Windows 7 - Using Control Panel (in classic view) -> Program Features, if ProjectDox Components is listed then REMOVE.
 - b. XP – Using Control Panel -> Add/Remove Programs, if ProjectDox Components is listed then REMOVE.
2. In Internet Explorer (**Internet Options->Browser History->Settings->View Objects** - remove anything Brava, ProjectDox, or Xupload).
3. After the above is completed, delete these directories and their contents: **IGC** (in Windows Vista or 7, do a search for the filename IGC to locate, then delete)
 - a. In XP Documents and Settings->User Account->**IGC**.
 - b. In XP Program Files->Avolve->**Components**).

Re-Install ProjectDox Client Components

4. Reinstall the ProjectDox components by clicking on the link on the login page..(Again, if Vista or Windows 7, UAC must be OFF for this to work.)
5. Once the components are installed, you can turn UAC back on.

NOTE: If you have any problems with software installation, send email to knoxplans@cityofknoxville.org for further instructions.